

REFINING THE FUTURE

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Transforming the SADC mining sector through
innovation, collaboration, and a commitment
to Africa's sustainable future.

IT'S TIME TO JUST DO THE JUST TRANSITION

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As we launch this second edition of the MIASA magazine, 2025 is proving to be an inflection point in geopolitics. Economic headwinds in the wake of this tumult are not sparing the Southern African Development Community (SADC) region or its bellwether extractives sector.

Though demand has remained resilient to tariff- and strife-precipitated uncertainty for many of the energy transition minerals found in our subcontinent, the ensuing upswing and continued strengthening of prices for these, as well as gold, are stretching government regulatory oversight bodies, tax authorities and law enforcement to their limits.

Many mineral hosting communities risk slipping into unhealthy cycles of dependency on unsafe illegal mining while facing the pain of crime, social upheaval, loss of arable land and poor water quality. Some already have. These negatives erode the entire industry's social license and increase fatalities, along with security, insurance and environmental risks and their attendant costs.

Since 2022, MIASA's position on the optimal path forward for mining in the SADC has been clear: our region is unique and deserves thoughtful consideration from an informed and responsible consuming North. The transition to renewable energy must be pragmatic, ensuring that none of our region's citizens are left behind. If energy poverty persists, we risk accelerating deforestation in the Congo Basin – the planet's second-largest carbon sink – with devastating consequences. Such loss would not only deepen poverty but also increase the frequency of extreme weather disasters, undermining much of the progress made by the global shift to greener mobility and energy generation.

The recent global recognition that coal and gas will continue to play a significant role in the energy mix presents an opportunity to manage this transition in a way that ensures no one in the SADC region is left behind. Expanding not only wind and hydropower, but also coal-based generation within the Southern African Power Pool, can drive value chain-led regional reindustrialisation and create jobs both upstream and downstream of extraction – jobs our rapidly growing youth population urgently

needs. It is time to just do it – to pursue a just transition by expanding SADC coal generation for several more decades while ensuring fair carbon credit pricing.

There are enablers to this process that providers of capital and transition mineral-consuming countries in the northern hemisphere must factor into their security-of-supply considerations. Soft infrastructure investment by SADC governments – including back-office automation, retooling and change management in extractive industry oversight – is essential to deliver an even, transparent and fair playing field for responsible, tax-paying miners. These same technology-enabled oversight systems must also deliver swift sanctions for noncompliance, illicit financial manipulation and criminality. All of this is as important a precursor as expanding grid interconnections and rail infrastructure.

The SADC region needs more boots on the ground, equipped with modern mining regulation tools such as scanners, drones and artificial intelligence, alongside the development of strategic Atlantic and Indian Ocean corridors – Lobito, Tazara-Bagamoyo, Walvis Bay and Nacala. These initiatives will help build middle classes, strengthen national treasuries and open the hinterland, creating the greatest opportunity to reduce poverty and youth unemployment: intra-regional and intra-continental African trade.

The increasing urgency of security of mineral supply requires not aid but creative co-financing from partners across the Northern Hemisphere, working with SADC governments to de-risk investment. This will in turn encourage responsible private mining investment – both local and international – at a pace that supports SADC development while meeting global climate change goals.

It is my hope that this edition offers readers a clear view of the SADC mining landscape: for those beyond our borders, an understanding of our priorities and our progress; for those within the region, insight into our neighbours' efforts and opportunities. Above all, I hope it inspires many more to explore, invest and build the mines of the future – for the benefit of all.

THE ROLE OF MINING IN MALAWI VISION 2063

MALAWI

DR GRAIN MALUNGA

Executive Secretary

Malawi Chamber of
Mines and Energy



Mining is a primary industry that supports food productivity and industrialisation. Agricultural productivity relies on mineral elements such as phosphate, potassium, magnesium, zinc and boron. Industrialisation, in turn, depends on minerals used in products including iron, steel, cement, titanium, coal, glass sand, niobium, uranium and rare earths. These products support job and wealth creation as well as food security.

Malawi **Vision 2063** states, “mining has tremendous potential to develop and support the inclusive wealth creation agenda”. This long-term national development blueprint sets out three mutually reinforcing pillars for Malawi to become an inclusively wealthy, self-reliant, industrialised upper-middle-income country by 2063.

Pillar 1: Agriculture Productivity and Commercialisation

Mining can create markets for agricultural products by supplying mines with food from cooperative farming in crops, livestock and fisheries. It can also offer technical and financial support to such initiatives. In addition, rock phosphate can be mined and processed for the production of phosphoric acid.

Pillar 2: Industrialisation through mining

Mining-driven industrialisation has the potential to foster mineral value addition, research, science and innovation. It opens the way to exporting high-value mineral products such as uranium, niobium, rare earths, graphite and titanium (rutile/ilmenite). This in turn can generate significant direct and indirect jobs, build foreign reserves and support wealth creation.

Pillar 3: Urbanisation including tourism

Urbanisation and tourism will benefit from the creation of mine towns and cities with improved health, education and reticulated water facilities. These urban centres will also drive higher consumption of agricultural products. Urbanisation will increase demand for industrial minerals such as cement, sand and aggregate, iron and steel and ceramic clays.

Enablers of this Transformational Agenda

The above scenario can be achieved in the medium-to-long term if the following enablers are prioritised:

Economic infrastructure

Provision of modern transportation links such as tarred roads and rail lines, electricity and financing mechanisms through development finance would go a long way towards speeding up the development of the mining sector.

Transport infrastructure

Malawi's mineral resource endowment is spread throughout the whole country. There is a need to develop cheaper transport modes such as lake services and rail linkage to Monkey Bay Port. Chilumba and Nkhata Bay ports need to be rehabilitated. Migowi to Nambazo, Migowi to Songwe, Mangochi to Makanjira, Likuni to Malingunde, Makawa to Njereza, Chitipa Junction to Kayelekera, Kasungu to Chikowa and Chamono to Kanyika roads need to be upgraded to provide easy transportation of mineral products.

Electricity connectivity

Provision of electricity is the backbone of mineral development. Current power generation is about 554.24 MW, of which 101 MW comes from solar.

AREAS OF INTERVENTION

01

Development of high-value mines through Public Private Partnership (PPP) arrangements

02

Promote value addition for job creation

03

Modernise mining legal frameworks to align with private sector growth

04

Institutional transformation and restructuring

Potential Game Changers

1. Mining earmarked as an enabler in funding the Malawi 2063 Vision
2. Mining has linkages with agricultural productivity, industrialisation and infrastructure development
3. Reserve Bank of Malawi to buy gold and support the establishment of cooperatives
4. National Mining Company to be established to hold government equity and provide technical expertise in contract negotiation
5. Mining regulatory authority to be established, equipped with a state-of-the-art laboratory and inspectorate, and staffed with professional personnel who are currently under-utilised

Building strong partnerships

- Limit the vetting of mining contract drafts to no more than two months
- Approve mining contracts within six months through cabinet and parliamentary processes for mining of niobium, rare earths, uranium, graphite, rutile and other heavy mineral sands
- Promote social contracts through community development agreements and informed consultation
- Finalise the petroleum exploration and production policy along with related legislation
- Develop a standard template for petroleum sharing agreements
- Fast-track licensing approvals, especially at higher policy levels
- Monitor and enforce compliance through capacity building and adequate staffing
- Exempt early-stage mineral exploration (up to pitting and trenching) from environmental and social impact assessment (ESIA) obligations
- Build trust and motivation in licensing procedures

Success factors for delivering Vision 2063

This collective effort will build on success factors identified by Malawians:

- Good governance
- Economic growth and development fundamentals
- Investment and entrepreneurship development
- Developed economic infrastructure
- Strengthened macroeconomic policies and public service delivery
- Strong alliance between government and the private sector.

LINKING MINING TO WEALTH CREATION IN MALAWI VISION 2063



IF SA PURSUES UNFRIENDLY MINING LAWS, OUR INVESTMENT CRISIS WILL DEEPEN

Opinion

MZILA MTHENJANE

CEO

Minerals Council SA



The mining industry's contribution to South Africa and its people is — and has for a century been — a cornerstone of our economy despite the regulatory, administrative and operational difficulties that have prevented it from reaching its full potential.

The mining industry has its role to play, for without it, the potential to beneficiate minerals would not be possible. However, once the minerals are mined, the country needs to support the development of a downstream value chain that can take these minerals and value-add them into products that are sold above the prevailing metal trading prices in the standard markets.

This is what true beneficiation looks like. Achieving this is not the responsibility of mines but sits within an enabling environment that should be provided by government policy to harness private sector capital beyond mining and foreign investment and expertise.

South Africa has a long history of mining and adding value to mineral ores, and there remains more opportunity for further beneficiation and fabrication of the minerals that are mined in South Africa. Since 2007, gold jewellery fabrication in South Africa has dropped from 7.5 tonnes of gold to less than one tonne (Jewellery Council, 2015).

The statistics show that since the implementation of the Precious Metals Act, 2005, beneficiation (fabrication) of precious metals has declined in all sectors except gold coin fabrication. Even gold coin fabrication expansion was not attributable to an enabling Act, but due to a bullish gold market.

Eskom has, since its founding in 1923, used locally mined coal to provide electricity to grow the biggest and most sophisticated economy and industrial base in Africa. Sasol's coal-to-liquid fuels processing is another example of value addition from this commodity.

A century ago, Rand Refinery opened, becoming the world's largest single-site gold refinery, producing Krugerrands

since 1967 to lead the world in bullion coins, creating additional demand for South African gold. More than 60 million ounces of Krugerrands have been sold in the past five decades. This is beneficiation at work in South Africa, but it is limited to a select few businesses. Rand Refinery and Metal Concentrators, among others, produce gold bars and semi-fabricated products used in jewellery manufacturing, supporting the beneficiation economy.

However, there is not nearly enough manufacturing in this portion of the value chain to make a meaningful impact on demand for the precious metals that are mined.

Major platinum group metal (PGM) producers are engaged in the complex chemistry of smelting and a two-stage refining process to produce the six metals sought after around the world by the automobile, jewellery, medical products and industrial processing industries.

There is future potential for PGM demand for hydrogen energy. Our local autocatalytic converter industry, at full capacity, had a share of about 19% of the global market.

By the early 2000s, South Africa was a leading source of ferrochrome, ferromanganese and ferrovanadium, all used in the global steel industry. With increasingly expensive and erratic electricity supply since 2008, high transport and labour costs, our global competitiveness has eroded, rendering it unable to withstand downturns in prices as China aggressively expanded its local ferroalloy industry. Today, we hardly have ferrochrome furnaces operational because of persistent operational constraints.

South Africa is now exporting record volumes of chrome and manganese ore, mainly to China, which has become the largest maker of ferrochrome and a major producer of ferromanganese.

Local diamond beneficiation, also in decline, once employed more than 3,000 cutters and polishers and now has barely 300 remaining.

The growing discourse in the government and the economy about beneficiation of mineral production must be considered against the lived reality of the mining and manufacturing sectors.

De-industrialisation in South Africa has been under way since 1993. The GDP share of manufacturing has declined from 21.4% to less than 13% in recent years.

It is only when specific conditions are met, including that a large offtake contract or a sustainable market is secured and the binding constraints on beneficiation are removed, that punitive measures on the mining industry have any chance in boosting in-country beneficiation that is globally competitive.

Higher levels of beneficiation can only be achieved through the reduction of burdensome red tape and policy, which has had a proven strong negative effect on local beneficiation, as we've seen in the diamond industry. An overly legislated environment has added compliance cost, dissuaded much-needed international investment and has caused widespread job losses without any upside benefits.



The growing discourse in the government and the economy about beneficiation of mineral production must be considered against the lived reality of the mining and manufacturing sectors.

The pending Mineral Resources Development Bill, as well as possible regulations from a department like Trade, Industry and Competition (DTIC) must, as far as possible, avoid imposing any restrictions or sanctions on the free flow of mineral exports.

In the absence of concrete evidence that restrictions on mining activity will 1) not harm primary mineral extraction, and 2) support more in-country beneficiation, we favour an incentive-based approach to achieve higher levels of beneficiation. Future beneficiation on commercial grounds will only be possible through securing investment and growth in exploration and primary mining.

The Minerals Council of South Africa is a firm supporter of local beneficiation to maximise the benefit of South Africa's minerals and create jobs and wealth for the country and its citizens, but pragmatism and a firm grasp of economic realities must prevail in creating an attractive operating environment for fabricators to beneficiate local minerals.

Fixing the underlying constraints of expensive and erratic electricity supply and inadequate and expensive transport logistics, as well as enhancing the level of manufacturing skills, will go a long way to halting – and potentially reversing – the trend of closures of smelters in South Africa's ferroalloys industry, a key factor in reduced load shedding.

The de-industrialisation of our economy demands urgent intervention. Structural reforms are needed to encourage private sector participation and reverse the constraints leading to business closures and curtailed investments in industrial processes. While the Minerals Council is encouraged by the progress to date, in some cases an enabling environment remains absent for mining and beneficiation.

In remote and rural areas where the bulk of mining happens, the dysfunctionality of municipalities makes daily operation difficult and unattractive for investments for any companies considering setting up businesses. The inability for licences to be validated and companies to be vetted through licensing offices makes compliance an increasingly challenging problem across the value chain and ultimately deteriorates the image of beneficiated minerals made in South Africa.

The Mineral Resources Development Bill's amendments are a pivotal point for our mining industry. The Minerals Council has in all engagements with the Department of Mineral and Petroleum Resources advocated for investor-friendly, pragmatic regulations to encourage growth of the mining industry through increased exploration, mine development and investment in existing mines. Given our mineral endowment, the number of new greenfield mining operations in South Africa is disappointing.

It would be a tragedy if the growth prospects for the South African mining industry and expansion for fabrication were ignored in favour of a more onerous, prescriptive and unfriendly mining and trading legislation that entrenches negative sentiment towards our country as a prospecting and mining investment destination. Over-regulation of beneficiation in the value chain will continue to constrain and reduce the amount of value that South Africa receives for its minerals and the jobs that the industry could stand to create.

BY THE NUMBERS

21.4% – <13%	Drop in manufacturing's share of GDP since 1993
300	Diamond cutters and polishers still employed, down from more than 3,000
19%	Share of global autocatalytic converter market once held by SA at peak capacity
60m oz	Krugerrands sold since 1967
2008	Electricity, labour and transport costs and instability began eroding ferroalloy competitiveness
Record volumes	Chrome and manganese ore exports, mainly to China

KILI CHALLENGE 2025: THE ESSENCE OF NOT GIVING UP

For more than two decades, Geita Gold Mining Limited (GGML) has championed responsible mining in Tanzania – but its commitment extends far beyond resource extraction. True success, the company believes, lies in building a thriving ecosystem that benefits its employees, neighbouring communities and the environment as much as its bottom line.

This philosophy is most visibly expressed through the annual GGM Kili Challenge, organised by the GGML Kilimanjaro Challenge Trust Against HIV & AIDS, established in 2002. The Trust has become a cornerstone of GGM's corporate social responsibility initiatives. Each year in July, a team of GGML employees and external participants embark on a grueling climb and cycle of Mount Kilimanjaro, Africa's highest peak, to raise funds for social projects.

The challenge is not only physical, but also a powerful symbol of the company's commitment to tackling critical social issues in Tanzania. The GGM Kilimanjaro Challenge isn't just about conquering a mountain – it's about conquering challenges on a much larger scale.

One of the main beneficiaries is the Moyo wa Huruma Orphanage Centre. During a recent visit, staff and children welcomed the GGML delegation and Kili Challenge

participants, introducing them to orphanage director Sister Maria Lauda Benedict, who spoke of the positive changes and transformative impact of the Trust's support.

"Since receiving support from GGML and the partners, we've been able to provide the children with better facilities, nutritious meals and access to quality education. This has greatly improved their wellbeing and overall development," she said.

The day included tree planting around the orphanage grounds – a symbol of growth and sustainability, and a reflection of GGML's commitment to environmental conservation. It ended with an energetic fitness session of stretching, aerobics and games, led by professional trainers, underscoring the importance of physical health while strengthening bonds between the GGML team and the children.

GGML's success with the GGM Kilimanjaro Challenge is inspiring other mining companies to take a more proactive approach to social responsibility. The model highlights employee engagement and participation and the Challenge fosters a sense of purpose and community within GGML's workforce. This translates into higher employee morale and retention rates. The Trust works with local and



international NGOs and government agencies to ensure a holistic approach to tackling HIV and AIDS.



Since receiving support from GGML and the partners, we've been able to provide the children with better facilities, nutritious meals and access to quality education. This has greatly improved their wellbeing and overall development.

The initiative has garnered significant industry recognition, cementing GGML's position as a leader in responsible mining practices.

The GGM Kili Challenge is a testament to GGML's ongoing commitment to social responsibility. It symbolises the company's continued commitment to raising awareness and funds for important causes.

Simon Shayo, Vice President for Sustainability at AngloGold Ashanti (Africa), of which GGML is a subsidiary, and a Trustee of the GGM Kilimanjaro Challenge Trust Against HIV & AIDS, emphasised the long-term vision. "GGML has been operating in Tanzania for 25 years now and for all

the years that we have partnered in this initiative, we have saved lives. Almost 20 years ago, the Moyo wa Huruma Orphanage started with seven kids who found a home, and today we are talking of more than 170 kids. By working together, we can create a more sustainable and equitable future for all," he said.

The GGM Kili Challenge story is one of unwavering commitment, collaborative action and tangible impact. Through its commitment to corporate social responsibility, GGML isn't just climbing mountains; it's building a better future for the people of Tanzania, the environment and the mining industry itself.

On 25 April, GGML Kili Challenge hosted an official launch dinner at the Johari Rotana in Dar es Salaam to celebrate progress in the fight against HIV and AIDS in Tanzania, and to encourage further support from both new and existing partners.

The evening also served as a moment of reflection for this year's cyclists and climbers – a reminder that they carry not only their rucksacks, but also the aspirations of a company, the hopes of countless beneficiaries, and the vision of an entire nation striving for a more just and sustainable future.



GGM KILI TEAM, MOYO WA HURUMA VISIT

REFINING THE FUTURE: GOLD AMBITIONS TAKE SHAPE AT GEITA

BENJAMIN MCHWAMPAKA

Executive Secretary

Tanzania Chamber of Mines



As Tanzania approaches the October 2025 elections, following the dissolution of the 12th Parliament by President Samia Suluhu Hassan on 27 June, it is timely to reflect on the industrial milestones achieved under her leadership.

Among these, the Geita Gold Refinery (GGR) stands out for its role in transforming Tanzania's gold industry. It is the country's first locally owned refinery and the first to be led by a Tanzanian woman – entrepreneur Sarah Masasi.

Financed by domestic banks, GGR reflects the strength of Tanzanian capital in driving national industrialisation. Masasi's leadership offers a compelling example of how gender barriers in the traditionally male-dominated mining sector can be dismantled – while delivering measurable national economic value.

Tanzania's alignment with the Responsible Minerals Initiative (RMI), particularly in gold refining, has enhanced its reputation in global markets. GGR's involvement in the RMI audit process positions it as one of Africa's most compliant refineries. It is now in the final stages of securing RMI certification.



With a processing capacity of up to 600 kilograms per day and 15 kilograms every 8 to 15 minutes, GGR provides access to fair, legal and efficient local beneficiation.

GGR aims to become the second refinery in Africa accredited by the London Bullion Market Association (LBMA). Backed by substantial investment in technology, skills and compliance systems, it has already secured five ISO certifications and passed audits by RMI, Lloyd's of London and StoneX.



BY THE NUMBERS

1,000

tonnes of gold exported legally from Africa each year

453

tonnes of gold estimated to be smuggled annually

600kg

daily processing capacity at GGR

15kg

processed every 8-15 minutes

5

ISO certifications secured

20%

of GGML gold sold directly to the government

Research published by Swissaid indicates that Africa exports more than 1,000 tonnes of gold annually through legal channels – but an estimated 435 tonnes are smuggled, accounting for more than half of the global gold output. With only one LBMA-accredited refinery on the continent, GGR's drive for accreditation positions Tanzania to become a regional hub for ethical gold refining.

If successful, Tanzania will not only process its own gold but attract gold from neighbouring countries seeking secure, transparent and accredited refining. This could support both regional trade and domestic value retention – while bolstering Tanzania's fiscal base.



GGR's growth is further underpinned by its support for small-scale and artisanal miners, long marginalised by informal systems and illicit traders. With a processing capacity of 600 kilograms per day and up to 15 kilograms every 8 to 15 minutes, GGR provides access to fair, legal and efficient local beneficiation and mineral value-addition.

From a mining economics perspective, this improves traceability, curbs smuggling and supports proper taxation. It also contributes to stabilising the Tanzanian shilling.

Under Bank of Tanzania (BOT) governor Emmanuel Tutuba, Tanzania is advancing toward building its gold reserves and achieving economic independence. A recent agreement with the BOT enables Geita Gold Mining Limited (GGML) to sell 20% of its gold production directly to the government via GGR, boosting gold reserves and domestic refining capacity.

The partnership between GGR, GGML and BOT reflects a strategic push towards economic independence through value-added mineral exports. By reducing reliance on raw



exports, Tanzania enhances its resilience against global price shocks.

Importantly, GGR was financed without international loans – a signal of growing confidence in Tanzania's banking sector. This model of home-grown, locally funded industrialisation aligns with President Samia's broader vision for inclusive growth.

GGR's compliance with international standards – including LBMA, OECD, RMI and Anti-Money Laundering protocols – reinforces Tanzania's credibility as a responsible trading partner. For small-scale and artisanal miners, it opens pathways to global markets and better prices, anchored in good governance, in the form of transparency and compliance.

As the 2025 elections approach, GGR represents more than industrial success. It is a symbol of what inclusive, ethical and locally driven economic transformation can achieve under deliberate national leadership.

KEY FACTS

01

Credibility

GGR is on track to become Africa's 2nd LBMA-accredited refinery

02

Control

By refining more gold domestically, Tanzania enhances its control over the entire gold value chain

03

Inclusion

GGR gives small-scale miners direct access to global markets through fair, transparent processing.

2026 INTERNATIONAL MINE RESCUE COMPETITION

With training insights fresh from Canada, Zambia prepares to welcome the world's top mine rescue teams next April

Zambia will host the 2026 International Mine Rescue Competition (IMRC), bringing the world's leading mine rescue teams to the Copperbelt in April next year. The event will be co-hosted by Mopani Copper Mines PLC and FQM Kansanshi Mine, marking the first time the competition is staged in Zambia.

To prepare for the prestigious event, a Zambian delegation of mining professionals has completed a week-long, hands-on training programme in Timmins, Canada. Working alongside Ontario Mine Rescue, the team assisted in the organisation and delivery of the 2025 Ontario Mine Rescue Provincial Competition, gaining practical experience to help deliver a world-class event in 2026.

Held from 2 to 5 June at Kidd Creek Mine, the Ontario competition brought together eight teams from across the province, each having won their local contest. Under the guidance of Provincial Chief Mine Rescue Officer Shawn Rideout, competitors faced challenging simulated emergencies, including:

- Rescuing a miner trapped inside the confined space of an agitator machine underground
- Freeing a worker pinned to a wall by a personnel mobility vehicle underground
- Recovering a surface miner trapped under fallen rock

The Zambian team observed the full set-up and safety calibration process, including a mock run with a non-competing trial team to fine-tune logistics and timing. When the competition officially began, four teams started at staggered intervals, followed by another four, each demonstrating their skills, coordination and emergency response under pressure.



At the gala dinner closing the event at the Dante Club in Timmins, Glencore Kidd Creek Mine was crowned the 2025 Ontario Champion and is expected to represent Canada

at next year's IMRC in Zambia. The Zambian delegation received a warm welcome from attendees after being formally introduced by the organisers.

Ontario Mine Rescue CEO Mike Parent praised the preparation led by Rideout. "Shawn's depth of experience and dedication to mine rescue excellence were on full display throughout the week. The Zambian team has shown great commitment and readiness, and I am confident they are well-prepared to deliver a successful International Mine Rescue Competition in 2026," he said.

The Zambian team has shown great commitment and readiness... I am confident they are well-prepared to deliver a successful International Mine Rescue Competition in 2026.

Zambia Chamber of Mines Deputy CEO Talent Ng'andwe also commended the training. "We are grateful to Ontario Mine Rescue for providing us with such a comprehensive and practical experience," he said. "From the legacy of their 2016 IMRC hosting to their state-of-the-art annual competitions, the insights we've gained will be invaluable in elevating Zambia's mine rescue standards and in successfully hosting the 2026 IMRC."

During the visit, the Zambian team was invited to judges' debriefing sessions, where each of the eight competing teams received 45-minute performance reviews and recommendations. The delegation then travelled to Sudbury, Ontario, for final debriefs on Zambia's 2026 preparations and continued knowledge exchange before returning home.



ZAMBIA'S ROADMAP TO PROSPERITY

With the right approach, the country can turn its mineral wealth into middle-income prosperity, says the World Bank Group

Zambia aims to become a prosperous, middle-income country by 2030. The government, private sector and multi-lateral institutions such as the World Bank Group all agree that harnessing the country's endowment of critical minerals – or energy transition minerals (ETMs) – will be central to achieving this goal.

But what exactly needs to happen for Zambia to grow its mining sector, achieve its ambitious target of three million tonnes of copper annually, and seize the once-in-a-lifetime opportunity presented by rising demand for cobalt and other critical minerals?

As with any journey, reaching this destination will require a map. This is precisely the purpose of [*Repositioning Zambia to Leverage Energy Transition Minerals for Economic Transformation: A Roadmap*](#), produced by the World Bank Group (WBG) in collaboration with the government of Zambia, and launched in Washington DC on 23 April.

What kind of roadmap is this?

The data-driven report was compiled at the request of Zambia's Minister of Finance and National Planning, Situmbeko Musokotwane, by more than 100 experts and WBG consultants. From the outset, the minister required that it be a joint product with the government and practical to implement.

If Zambians want to participate directly, we need to generate the skills of the future – and in time. But we also need to promote local supplier development and adopt tried and tested 'local content' policies that enable SMEs to create those backward and forward linkages.

It outlines “a deliberate, whole-of-government approach and an integrated strategy for leveraging Zambia's ETM resources for economic transformation, focusing on maximizing the generation, sharing and management of benefits and minimising risks,” providing “a menu of policy

recommendations to address these challenges, along with proposals for implementing the roadmap”.

These recommendations cover mining, energy, transport, skills, value addition, local content and environmental sustainability – with actionable steps and specific lead agencies within each chapter.

Dr Martin Lokanc – senior mining specialist at the World Bank's energy and extractives global practice, and one of three of the report's lead coordinators – points out that it will take “more than just the Ministry of Mines” for Zambia to achieve its ambitious growth target, as the sector is closely linked to many others.



“Energy in particular needs to grow along with mining, especially if you want to have value addition – and transport constraints need to be addressed too,” he said. “If Zambians want to participate directly, we need to generate the skills of the future – and in time. But we also need to promote local supplier development and adopt tried and tested ‘local content’ policies that enable SMEs [small and medium-sized enterprises] to create those backward and forward linkages – not only in batteries, but also in simpler things like copper fabrication.

But economic development cannot happen at the cost of the environment or communities, and all of this has to be reinforced by Government at the same time. That's why the roadmap approach really is a ‘whole-of-government’ approach.”

What will Zambia gain by implementing this roadmap?

If implemented fully and rigorously, the roadmap could triple mineral production and increase government's fiscal take from mining three to four times – revenue that can be invested in infrastructure, education and health. It would create hundreds of thousands of quality jobs, with direct mining employment potentially quadrupling to around 200,000 and more than 300,000 indirect or induced jobs in services, logistics and manufacturing. In short, leveraging Zambia's mineral wealth in this way could transform the economy.

Fiscal and policy stability are essential to attract capital of this magnitude, as is creating a conducive investment climate for large-scale private sector participation.

“A great new era awaits critical minerals, the benefits of which hinge on the quality and stability of policy and regulatory responses,” said President Hakainde Hichilema at the March launch of the Zambezi Minute, a parallel initiative to harness global demand for critical minerals and attract foreign investment.

“If you look back to Independence, Zambia has never had a multi-decade stable plan for the mining sector,” said



What's next?

The next step is to take the roadmap to cabinet for approval. Financing is critical, with US\$14bn required by 2030 – 89% from private sources. By 2040, the cost rises to US\$32bn for full value-chain build-out, said Secretary to the Treasury Felix Nkulukusa at the 2025 World Bank Group–IMF Spring Meetings in Washington DC. This would represent foreign direct investment (FDI) on a scale Zambia has never seen. Securing the funds could place the country alongside thriving middle-income mining nations.

Sokwani Chilembo, CEO of the Zambia Chamber of Mines and President of MIASA.

“In the past, we failed to follow a plan, hence the outcome. Now we finally have one and – based on the experience of Peru, Chile, DRC and Botswana – if we stick to it, we can significantly improve our human development index score.”

The WBG and Government's collaboration via this optimistic new roadmap, he said, is an exciting step in the right direction.

THE MINING INDUSTRY ASSOCIATION OF SOUTHERN AFRICA (MIASA)

Driving a common vision for mining in Southern Africa



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Question

Q What is MIASA?

Answer

MIASA is an association of mining Chambers that started as a grouping of private sector Chambers of Mines who met in parallel with meetings of the Technical Committee of Mining Ministers in the SADC Region in 1996. At these meetings the private sector was not fully represented and it was criticized for not being organised as a private sector grouping.

In November 1997, during the second Regional Conference of African Ministers responsible for the development and utilisation of mineral and energy resources in Durban, South Africa, the SADC delegation met with representatives of national mining industry associations to explore a formal relationship. The delegation recommended establishing a regional mining industry association with a constitution to define its structure and functions.

National associations agreed to pursue this idea, and the SADC delegation undertook to propose to the Mining Sector Technical Committee that the new body be given formal representation and the standing opportunity to address the Committee of Mining Ministers.

In 1998, the Mining Industry Association of Southern Africa (MIASA) was formally established by four founding Chambers: the DRC Chamber of Mines, Namibia Chamber of Mines, Zambia Chamber of Mines, and the Minerals Council South Africa (formerly the Chamber of Mines of South Africa).

MIASA has since expanded to include the Chambers of Mines of Botswana, Lesotho, Madagascar, Malawi (Chamber of Mines and Energy), Mozambique, Tanzania, and Zimbabwe – covering nearly all SADC mining jurisdictions that have a Chamber. Membership is restricted to Chambers of Mines only.

Q What is the purpose of MIASA?

The purpose of MIASA is to promote and protect the interests of the mining industry, creating an enabling environment for it to prosper. It was formed to represent the mining private sector in engagements with the SADC Committee of Mining Ministers and to work with the SADC Secretariat on regional issues affecting the industry.

MIASA played a leading role in finalising the Regional Mining Vision, adapted from the [Africa Mining Vision](#). It positions itself as a key stakeholder on any SADC proposal that could affect the mining sector and is currently engaging with the SADC Secretariat on proposed amendments to the regional mining protocols.

Q What has MIASA achieved since it was established?

The growth of MIASA's membership is an achievement in itself, reflecting the value national Chambers of Mines place on having a strong, united voice for the mining industry on policy, legislation and other matters affecting the sector. MIASA has positioned itself as a leading regional private sector mining body in Africa and internationally. It was the first regional mining association to be established on the continent and has become the benchmark for similar bodies.

The Association has partnered with the African Union Commission to establish other private sector associations, including the ECOWAS Federation of Chambers of Mines in West Africa, the Central Africa Mining Association and the East Africa Chambers of Mines and Extractive Industry Association. MIASA also serves as the Secretariat of the Association of Chambers of Mines and other mining associations in Africa. Its role in creating these regional and continental bodies underscores its leadership on mining matters across the continent.

Within its membership, MIASA convenes twice a year to share best practice and exchange advice on policy and legislative challenges at country level. It has developed a number of cross-cutting position statements endorsed by all members. The Association has also positioned itself as a thought leader by participating in international forums such as the Mining Indaba and PDAC, presenting insights on the mining industry and engaging widely to promote investment and growth.

Q What are the key challenges for MIASA?

MIASA's current key challenge is the re-establishment of the Forum of Mining Ministers in the SADC region. This forum is vital for developing and driving a common vision for mining in the region, and MIASA is encouraged by the SADC Secretariat's support for its revival.

The SADC also needs to develop effective integration mechanisms that benefit the entire region. A revitalised forum would allow discussion on how fragmented national policies are counter-productive to growth and can discourage direct investment in mining. At present, governments are calling for value addition without a well-considered regional strategy to support it.

Engagement through the Forum of Mining Ministers is essential to building a coherent approach that strengthens the comparative and competitive advantages of mining in the SADC.

The region is richly endowed with nearly all the minerals sought by global industries, including those driving the current demand for critical minerals. There is an urgent need for a unified strategy on how to respond to this demand without compromising the sovereignty of individual states.

THE MINING INDUSTRY ASSOCIATION OF SOUTHERN AFRICA (MIASA) REPRESENTS NATIONAL MINING ASSOCIATIONS WITHIN THE SOUTHERN AFRICAN DEVELOPMENT COMMUNITY (SADC)

