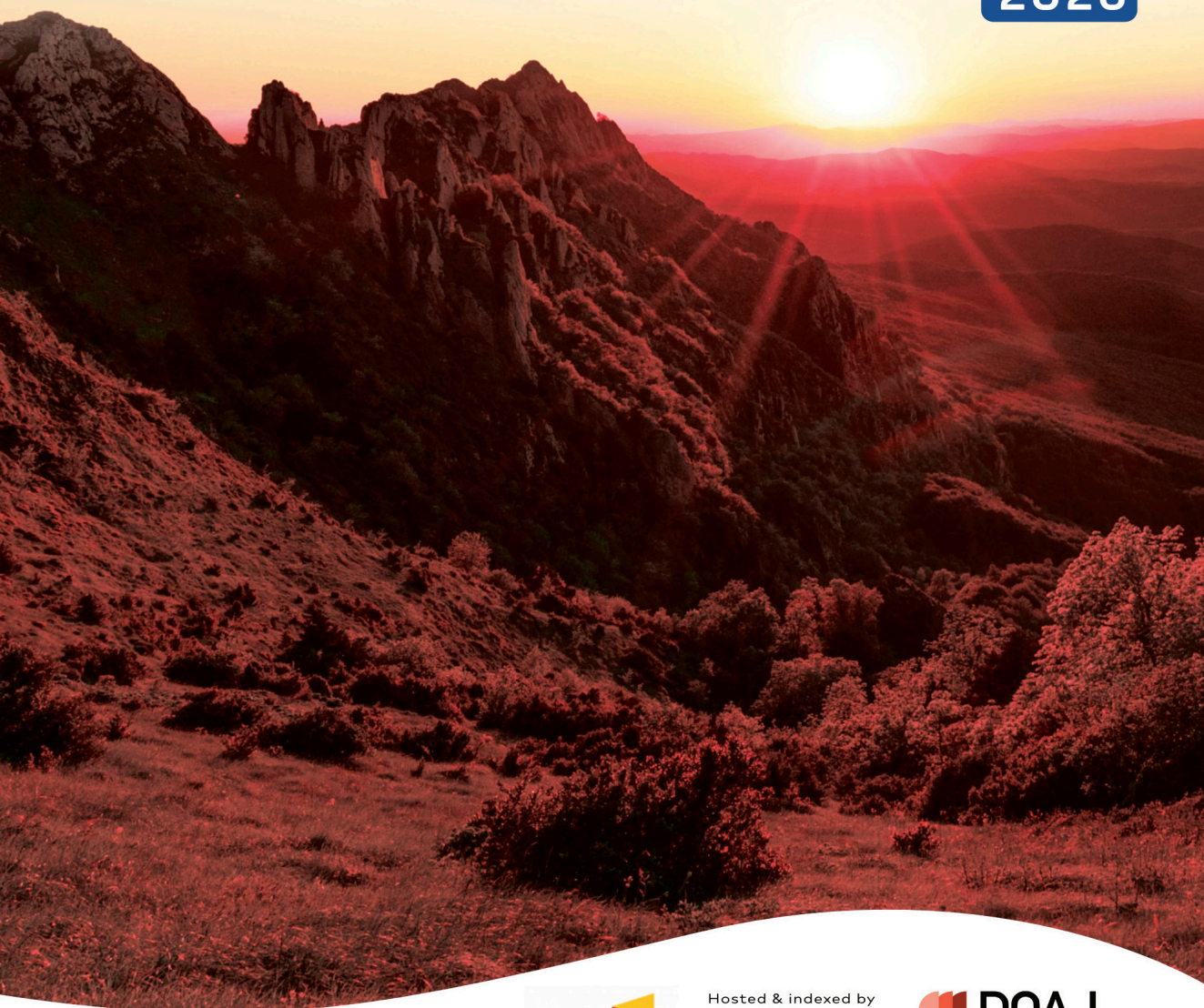


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Lithium Diplomacy and Economic Security: Zimbabwe's Critical Minerals Strategy in the Global Energy Transition

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Abstract

This paper theorises Zimbabwe's emergent lithium strategy as a form of critical minerals diplomacy situated at the nexus of economic security, ESG governance, and strategic statecraft within the global energy transition. It argues that lithium is being reconstituted from a passive geological endowment into a geopolitical instrument through which the state seeks to renegotiate its position in asymmetrical battery value chains. This repositioning is operationalised through an evolving regulatory architecture comprising export bans, strategic mineral designation, mandatory beneficiation, and targeted fiscal instruments aimed at internalising value and disciplining capital. Moving beyond binary interpretations of resource nationalism and developmental statism, the paper conceptualises Zimbabwe's approach as a hybrid strategy of constrained resource sovereignty, pursued under conditions of structural dependence on foreign capital, technological externalities, infrastructural deficits, and price volatility in global lithium markets. Empirically, the study traces a sequenced policy trajectory from the 2022 ban on unprocessed lithium exports to the 2026 suspension of both raw mineral and concentrate exports, demonstrating escalating regulatory assertiveness and recalibrated state-capital relations. The analysis situates Zimbabwe's lithium diplomacy within broader economic security debates shaped by rising demand, declining prices, and the geographic concentration of refining capacity. It argues that while regulatory escalation enhances bargaining power and discursive sovereignty, it does not guarantee structural transformation. Effective lithium diplomacy requires complementary capabilities, including energy reliability, logistics integration, contractual transparency, institutional credibility, technological learning, and inclusive stakeholder governance aligned with ESG imperatives. The paper concludes that without systemic capacity deepening, Zimbabwe risks entrenching enclave extraction under a more interventionist regime, thereby reproducing patterns of externalised value capture rather than achieving durable economic security.

Keywords: minerals diplomacy; economic security; ESG governance; Zimbabwe; lithium; beneficiation; energy transition

Introduction

Once at the fringes of economic debates, lithium has moved from the periphery of extractive industries into the core architecture of the global political economy, driven by the material intensities of decarbonisation. The rapid scaling of electric mobility, grid storage, renewable energy systems, and digital infrastructures has reconfigured minerals such as lithium from passive inputs into strategic assets embedded in industrial policy, trade diplomacy, and geopolitical competition. Recent projections indicate that lithium demand continues to expand despite price corrections, while refining capacity remains geographically concentrated, reinforcing asymmetric interdependencies across global value chains (International Energy Agency, 2025a; International Monetary Fund, 2024). In this context, critical minerals are increasingly securitised within statecraft, with governments deploying regulatory, fiscal, and diplomatic instruments to manage access, control value capture, and hedge against supply vulnerabilities (Müller, 2023; Vivoda, 2023; Bridge & Faigen, 2022; Overland, 2023).

This evolving landscape catalysed a shift from resource extraction to what may be termed ‘critical minerals diplomacy’, a strategic practice through which states leverage mineral endowments to renegotiate their position within global production networks while advancing economic security objectives. Such diplomacy is not merely material but also discursive, enacted through strategic communication that frames minerals as sovereign assets, legitimises regulatory intervention, and signals bargaining intent to international capital and partner states (Cornut & Paquin, 2022; IEA, 2025b). The Environmental, Social, and Governance (ESG) frameworks are also integral to this terrain, functioning both as governance benchmarks and as instruments of reputational power, shaping investment flows, risk assessments, and the legitimacy of extractive regimes (Sachs et al., 2022; Addison & Roe, 2023).

Zimbabwe has also entered this contested geopolitical space as one of Africa’s most significant lithium jurisdictions. Estimates of its resource endowment vary across the African continent, yet convergent evidence suggests that for the country, Zimbabwe has rapidly become the continent’s leading lithium producer, underpinned by accelerated mine development and export growth (African Development Bank, 2025; Mkodzongi, 2024; Reuters, 2026a). This expansion has been driven largely by foreign capital, predominantly Chinese firms such as Zhejiang Huayou Cobalt, Sinomine Resource Group, Chengxin Lithium Group, and Yahua Industrial Group, which, at the time of this study,

dominated upstream extraction and early-stage processing (IPIS, 2023; Wang et al., 2024; Reuters, 2025b). While this influx has accelerated output, it has simultaneously reproduced classic asymmetries of enclave extraction, with high-value refining and downstream manufacturing largely externalised.

In response, the Government of Zimbabwe (GoZ) swiftly and progressively repositioned lithium as a strategic mineral within a broader project of economic security and industrial restructuring. This repositioning materialised through a sequenced policy regime encompassing export bans on unprocessed ore (in 2022), mandatory beneficiation plans (in 2023), legal designation of lithium as a strategic mineral, and the subsequent suspension of both raw mineral and concentrate exports (in 2026). These measures reflect an increasingly assertive regulatory posture aimed at internalising value, recalibrating state–capital relations and signalling sovereign control over critical resources (Government of Zimbabwe, 2023a; S&P Global Commodity Insights, 2024; IEA, 2025c).

This paper, therefore, argues that Zimbabwe has correctly diagnosed the central developmental risk of the energy transition: that mineral booms can reproduce dependency if high-value segments remain externalised. The paper, however, quickly notes that regulatory control at the export gate, while necessary, is insufficient for structural transformation. Lithium diplomacy, if it is to function as an instrument of economic security, must be embedded within a broader ecosystem of infrastructural capacity, institutional credibility, technological learning, and strategically coordinated communication that aligns domestic policy signals with international expectations.

Zimbabwe's lithium trajectory thus constitutes a critical empirical and theoretical site for examining whether resource-rich developing states can convert the geopolitical salience of critical minerals into durable developmental gains. At stake is not merely national industrialisation, but the broader question of whether the global energy transition will reproduce existing hierarchies of value extraction or enable more equitable forms of economic restructuring.

In essence, the purpose of this study is to interrogate Zimbabwe's lithium strategy as an emergent form of critical minerals diplomacy oriented towards economic security within the global energy transition. The study offers a theoretically grounded analysis of how regulatory instruments, diplomatic positioning, and ESG-aligned governance are being mobilised to restructure Zimbabwe's participation in global lithium value chains. Specifically, the study

pursues three interrelated objectives. First, it elucidates the strategic rationale underpinning Zimbabwe's recent policy interventions, situating them within broader debates on resource sovereignty, industrial policy, and geopolitical competition over critical minerals (Müller, 2023; Saunders, Mlambo, & Ovadia, 2023; Mkodzongi, 2024). Second, it evaluates the internal coherence, sequencing, and implementation capacity of these measures, with particular attention to whether they enable substantive domestic value retention or primarily function as instruments of sovereign signalling. Third, it incorporates regulatory developments which remain under-theorised in existing scholarship, to demonstrate a shift from conventional anti-raw-export policies towards a more disciplinary governance regime centred on beneficiation compliance, strategic control, and economic security claims (IEA, 2025b; IEA, 2025c; Ministry of Mines and Mining Development, 2026; Xinhua, 2026). In doing so, the study contributes to emerging scholarship at the intersection of international relations, ESG governance, and strategic communication by assessing whether Zimbabwe's lithium diplomacy can transcend enclave extraction and generate structurally transformative outcomes.

Conceptual Positioning of the Study

This study adopts Constrained Resource Sovereignty (CRS) as its primary analytical framework. Lithium diplomacy is conceptualised as the strategic mechanism through which constrained sovereignty is exercised, while economic security represents the desired developmental outcome. ESG governance and strategic communication function as enabling and legitimising dimensions of this process. Through this framework, the study explains how Zimbabwe attempts to leverage lithium resources to improve its position within global battery value chains while remaining constrained by structural dependence on external capital, technology and processing networks. This perspective provides a coherent explanatory lens for understanding the possibilities and limitations of Zimbabwe's critical minerals strategy. Figure 1 provides the conceptual architecture

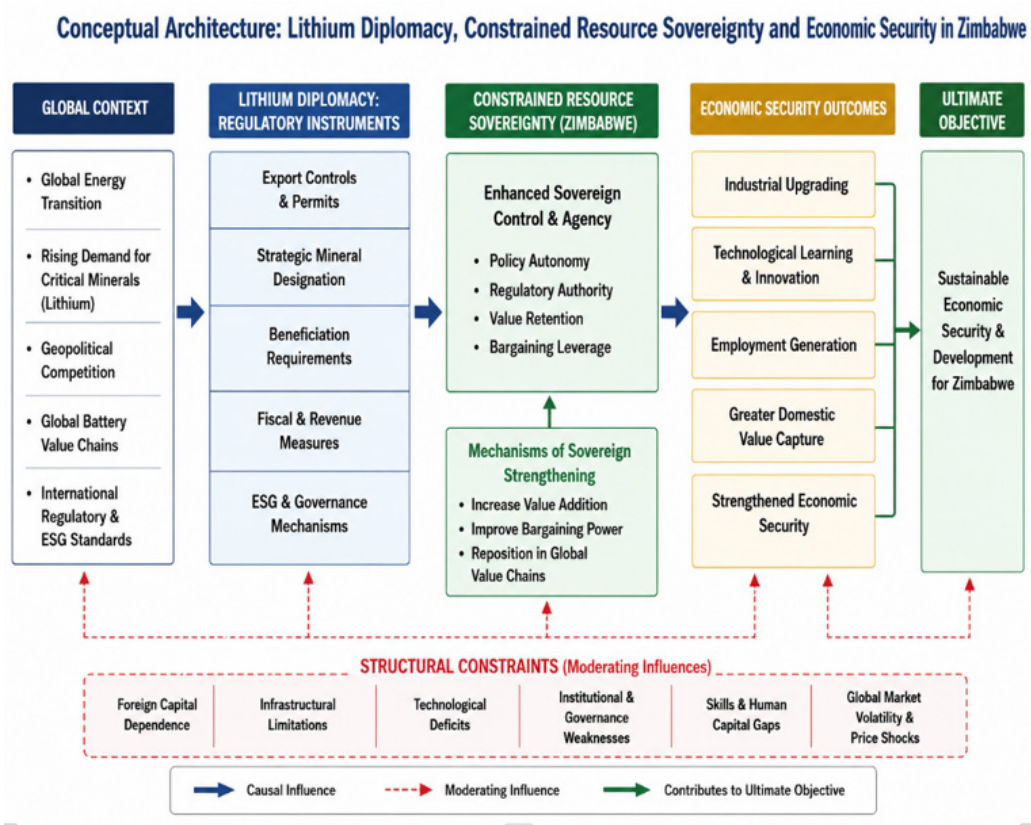


Figure 1: Conceptual Architecture

Figure 1 presents the conceptual architecture underpinning this study. The model illustrates the causal relationship between critical minerals diplomacy, constrained resource sovereignty, and economic security outcomes. It demonstrates how regulatory instruments such as export controls, strategic mineral designation, beneficiation requirements, fiscal measures, and ESG governance mechanisms are deployed as instruments of lithium diplomacy. These interventions collectively seek to strengthen Zimbabwe’s capacity to exercise constrained resource sovereignty by increasing value retention, improving bargaining leverage, and repositioning the country within global battery value chains. The ultimate objective is the enhancement of economic security through industrial upgrading, technological learning, employment generation, and greater domestic value capture. However, the model also acknowledges the moderating influence of structural constraints, including foreign capital dependence, infrastructural limitations, technological deficits, and global market volatility.

Literature review

Critical Minerals and Economic Security

Literature on critical minerals and economic security demonstrates a profound transformation in the strategic significance of mineral resources within the global political economy. Critical minerals, particularly lithium, shifted from being industrial inputs to being strategic assets central to national security, industrial competitiveness, and geopolitical influence (Farrell & Newman, 2023; IEA, 2023, 2024, 2025a; Overland, 2023). The global energy transition intensified demand for lithium while simultaneously exposing vulnerabilities associated with geographically concentrated supply chains and processing capacities (IMF, 2024; Moerenhout et al., 2023). Governments are deploying industrial policies, trade regulations, investment screening, and diplomatic partnerships to secure access to critical minerals and reduce strategic dependence.

The dominant debate concerns whether critical mineral securitisation enhances economic resilience or merely reproduces new forms of dependency. In the United States, initiatives such as the Minerals Security Partnership reflect efforts to diversify supply chains and reduce dependence on Chinese processing capacity (Vivoda, 2023). Similarly, the European Union's Critical Raw Materials Act advances strategic autonomy through supply diversification and domestic processing. However, scholars argue that despite heightened strategic visibility, many resource-rich states remain confined to upstream extraction while downstream value creation remains concentrated in technologically advanced economies (Müller, 2023; IEA, 2024). Thus, economic security is understood not simply as resource ownership but as control over value-added stages of production.

Resource Nationalism and Beneficiation

A second major debate centres on resource nationalism and beneficiation as mechanisms for enhancing domestic value capture. Resource-rich states are employing export controls, local content requirements, strategic mineral designation, and processing mandates to strengthen sovereign control over critical minerals (Saunders et al., 2023; Mkodzongi, 2024). Such measures shift countries from raw material exporters to participants in higher-value segments of global value chains.

Evidence from Latin America's Lithium Triangle illustrates both the appeal and limitations of these approaches. Bolivia pursued strong state control, Chile adopted hybrid governance arrangements, and Argentina favoured market-oriented approaches. Despite these differences, all three countries struggled to achieve substantial downstream industrialisation due to technological, financial, and institutional constraints (Riofrancos, 2020; IMF, 2024). Similar trends are evident in Africa, where beneficiation policies are promoted as vehicles for industrialisation but often confront infrastructure deficits, energy constraints, and limited technological capabilities (African Union, 2024; UNCTAD, 2025). The literature, therefore, questions whether resource nationalism can deliver structural transformation without corresponding investments in productive capabilities and industrial ecosystems.

ESG Legitimacy and Green Extractivism

The rise of Environmental, Social, and Governance (ESG) frameworks introduced a normative dimension to critical mineral governance. ESG standards are increasingly used by investors, governments, and international organisations to evaluate the sustainability and legitimacy of mineral extraction activities (León et al., 2023; Sachs et al., 2022). While proponents argue that ESG frameworks enhance transparency, accountability, and environmental stewardship, critics contend that they frequently function as mechanisms of regulatory power that legitimise continued extraction under the banner of sustainability.

This debate is particularly evident in discussions of green extractivism. Scholars argue that lithium extraction, despite its association with decarbonisation, often reproduces historical patterns of environmental degradation, unequal value distribution, and social exclusion (Sovacool et al., 2020; Dunlap & Jakobsen, 2020; Jerez et al., 2021). Studies from Chile, Argentina, Bolivia, and Africa document concerns relating to water depletion, community displacement, weak participation, and uneven benefit-sharing (Liu & Agusdinata, 2020; Flexer et al., 2021; Nyamwanza & Bhatasara, 2025). ESG governance remains contested, situated between its potential to improve governance outcomes and its tendency to legitimise extractive expansion without fundamentally altering underlying power relations.

Critical Minerals Diplomacy and Strategic Communication

A growing body of scholarship conceptualises critical minerals as instruments of diplomacy and strategic communication. States use policy interventions,

diplomatic agreements, and public narratives to signal strategic intent, attract investment, and reposition themselves within global supply chains (Cornut & Paquin, 2022; Vivoda, 2023; Farrell & Newman, 2023). Critical minerals diplomacy extends beyond traditional resource management by integrating foreign policy, industrial strategy, and economic security objectives.

China's dominance in lithium refining and battery manufacturing has intensified diplomatic competition among major economies seeking alternative supply arrangements (IEA, 2025a; Moerenhout et al., 2023). Countries such as Australia, Japan, South Korea, and India adopted diverse diplomatic strategies combining overseas investments, strategic partnerships, and industrial policy interventions (Overland, 2023; Müller, 2023). The literature further argues that policy announcements, strategic mineral designations, and ESG commitments often function as strategic communication tools intended to shape investor perceptions and enhance bargaining leverage. However, scholars caution that policy signalling must be supported by implementation capacity; otherwise, it risks becoming performative rather than transformative.

African Mineral Governance and Structural Dependence

The African literature highlights a persistent tension between mineral wealth and structural dependence. Although critical minerals are increasingly viewed as opportunities for industrialisation and economic diversification, African countries continue to occupy predominantly upstream positions within global value chains (African Union, 2024; IMF, 2024). Resource governance challenges, infrastructure deficits, technological dependence, and external control over processing capacity constrain efforts to achieve meaningful value capture.

This tension is evident in Zimbabwe's lithium sector. Recent policy interventions, including export bans, beneficiation mandates, and strategic mineral designation, reflect an assertive effort to enhance resource sovereignty and domestic value retention (Mkodzongi, 2024; Ministry of Mines and Mining Development, 2026). However, empirical studies highlight persistent challenges related to governance coherence, institutional capacity, regulatory predictability, and community participation (Saunders et al., 2023; Mutlokwa & Okoloise, 2025; Takura, 2026). Zimbabwe, hence, exemplifies a broader African dilemma: how to leverage growing geopolitical demand for critical minerals while avoiding the reproduction of extractive dependency and unequal integration into global value chains.

Research Gap

Although the literature on critical minerals has expanded considerably, existing scholarship remains fragmented across several analytical traditions. Studies on economic security primarily focus on supply-chain resilience and geopolitical competition, while research on resource nationalism examines state intervention and value retention. Similarly, ESG scholarship emphasises governance, sustainability, and justice concerns, whereas critical minerals diplomacy literature concentrates on strategic positioning within global value chains. Limited attention is devoted to understanding how resource-rich African states utilise critical minerals diplomacy as a mechanism for pursuing economic security under conditions of structural dependence. The Zimbabwean case presents an important opportunity to bridge these literatures by examining how regulatory interventions, beneficiation policies, diplomatic signalling, and ESG governance interact within a broader strategy of constrained resource sovereignty. In doing so, the study contributes to emerging debates on critical minerals governance, economic security, and the political economy of the global energy transition.

The literature, in other words, converges on five interrelated debates: economic security, resource nationalism, ESG legitimacy, critical minerals diplomacy, and structural dependence. While scholars recognise lithium as a strategic resource central to geopolitical competition and industrial transformation, significant uncertainty remains regarding whether resource-rich developing countries can convert strategic relevance into sustainable economic security. Existing studies tend to examine these themes separately, with limited integration of economic security, ESG governance, and strategic communication perspectives. Furthermore, Zimbabwe's recent regulatory escalation, including strategic mineral designation, beneficiation enforcement, and export restrictions, remains under-theorised within the emerging critical minerals diplomacy literature. This study addresses this gap by developing an integrated framework that analyses Zimbabwe's lithium strategy as a form of critical minerals diplomacy operating at the intersection of economic security, constrained resource sovereignty, ESG governance, and strategic statecraft.

Synthesis: From Extractivism to Strategic Mineral Diplomacy

Most contemporary studies demonstrate a decisive shift from resource extraction as an economic activity to critical minerals as instruments of diplomacy, security, and strategic communication. Across regions, states are

actively attempting to reposition themselves within global value chains through a combination of regulatory intervention, industrial policy, and geopolitical alignment (Farrell & Newman, 2023; Vivoda, 2023; IEA, 2025a). Yet, a central contradiction persists: while resource-rich states have gained geopolitical visibility, their capacity to achieve economic security remains constrained by structural asymmetries in technology, finance, and processing.

Simultaneously, ESG and strategic communication introduce new dimensions of legitimacy, requiring states to balance economic objectives with environmental and social governance. In this context, Zimbabwe represents a critical case through which to interrogate whether critical minerals diplomacy can transcend extractive dependency or whether it risks entrenching a new form of “green” subordination within the global political economy.

The literature on critical minerals and economic security consistently demonstrates that energy transition minerals have been securitised and repositioned at the centre of industrial policy, supply-chain resilience, and geopolitical competition (IEA, 2023, 2025a; Farrell & Newman, 2023; Vivoda, 2023). Within this framework, Zimbabwe’s lithium endowment significantly enhances its geopolitical relevance and potential bargaining power within global supply chains. However, the literature also cautions that securitisation does not automatically translate into developmental gains. Security-driven frameworks may reproduce asymmetric interdependence, where resource-rich states remain confined to upstream extraction roles despite heightened strategic visibility.

A second strand of the literature focuses on resource nationalism and beneficiation, highlighting how states increasingly deploy export controls, local processing mandates, and strategic mineral designation to retain value and assert sovereignty (Müller, 2023; Saunders, Mlambo & Ovadia, 2023; Mkodzongi, 2024). Zimbabwe’s policy trajectory, characterised by export bans, beneficiation requirements, and the formal designation of lithium as a strategic mineral, aligns closely with this model of assertive mineral governance. Nevertheless, the literature underscores a persistent risk: policy ambition often exceeds infrastructural, financial, and administrative capacity. This misalignment can generate regulatory volatility, deter investment, and ultimately constrain the prospects for meaningful industrial upgrading.

The third strand centres on governance, ESG, and justice, emphasising that sustainable mineral development depends on transparency, participation, environmental stewardship, and equitable benefit-sharing (Sovacool et al., 2020; Mutlokwa & Okoloise, 2025; Nyamwanza & Bhatasara, 2025; Takura, 2026). In the Zimbabwean context, inclusive governance, particularly community participation and the integration of artisanal mining actors, is critical for ensuring the legitimacy and long-term durability of lithium policy. However, the literature warns that centralised, state-led approaches, if not balanced with accountability and social inclusion, can reproduce exclusionary outcomes, intensify social conflict, and reinforce patterns of “green extractivism” under the guise of energy transition. This consolidation demonstrates that Zimbabwe’s lithium governance must be understood not as a purely domestic policy domain, but as a contested interface between global geoeconomic restructuring, national industrial ambition, and localised governance realities.

Methodology

This study adopted a qualitative, desk-based research design anchored in interpretive political economy, enriched by insights from ESG governance and strategic communication theory. The methodological orientation reflects the core premise that Zimbabwe’s lithium sector cannot be adequately understood through production statistics or reserve estimations alone. Instead, the research interrogates how policy instruments, regulatory shifts, ESG positioning, and state discourse collectively constitute an emergent strategy of critical minerals diplomacy, and whether this strategy can advance economic security under conditions of global structural asymmetry.

From an interpretive political economy perspective, lithium governance was understood as both material and discursive. Materially, it is expressed through export controls, beneficiation mandates, fiscal regimes, and enforcement of compliance. Discursively, it is articulated through narratives of sovereignty, energy transition, economic security, and sustainable development. ESG frameworks and strategic communication were, therefore, not treated as peripheral but as constitutive elements of governance mechanisms through which the state signals credibility, aligns with global norms, and negotiates its position within international mineral regimes (Farrell & Newman, 2023; Overland, 2023; Sovacool et al., 2020; León et al., 2023).

The empirical evidence base was constructed from three interrelated source categories to capture both structural and real-time dimensions of lithium governance. First, the study drew from peer-reviewed academic literature on critical minerals, resource nationalism, ESG governance, and extraction politics in Africa and globally, providing the theoretical scaffolding for analysing lithium as a site of geopolitical contestation and sustainability discourse (IEA, 2023, 2025a; IMF, 2024; Moerenhout et al., 2023). Second, it analysed official and quasi-official policy instruments, including statutory and regulatory texts such as the Finance Act (2023), the Base Minerals Export Control Order (2023), and subsequent ministerial directives culminating in the 2026 export suspension measures issued by the Ministry of Mines and Mining Development. These are complemented by international policy frameworks, particularly those of the International Energy Agency, which situate Zimbabwe's policy trajectory within global supply-chain securitisation and energy transition dynamics (Government of Zimbabwe, 2023a; Government of Zimbabwe, 2023b; IEA, 2025b; IEA, 2025c; Ministry of Mines and Mining Development, 2026).

Third, the study incorporated high-frequency, verifiable industry and media reporting, including Reuters, Xinhua, and S&P Global Commodity Insights. This was methodologically significant because key governance developments between 2022 and 2026 remain underrepresented in academic literature. The sources were not treated descriptively but were critically triangulated against policy texts and scholarly debates, recognising that media reporting itself forms part of the strategic communication ecosystem through which state actions are interpreted, contested, and legitimised.

To enhance the credibility of the findings, a triangulation strategy was employed throughout the study. Regulatory developments were verified across multiple source categories, including official government statements, international agency reports, industry analyses, and independent media reporting. Attention was given to potential sources of bias. Government documents were recognised as reflecting official policy intentions, while international media reports could emphasise market implications and geopolitical considerations. Likewise, state-affiliated media sources were evaluated against independent reporting and regulatory documentation. Through this process, the study differentiated between official policy positions, market interpretations, and journalistic narratives, thereby reducing reliance on any single perspective and strengthening the reliability of the analytical conclusions.

The analytical process proceeded through four integrated stages. First, the study identified and chronologically mapped key lithium governance interventions from late 2022 onwards, establishing a temporal and strategic baseline. Second, the interventions were categorised into core governance functions, export control, strategic designation, beneficiation enforcement, fiscal discipline, and regulatory compliance, thereby revealing the internal architecture of Zimbabwe's lithium policy regime. Third, the measures were interpreted through three dominant analytical lenses: critical minerals security, resource nationalism, and ESG-governance/justice frameworks, enabling a theoretically grounded and comparative analysis (IEA, 2025a; Wang et al., 2024; Tanda & Genç, 2024). Fourth, and most critically, the study evaluated the alignment between policy ambition, ESG credibility, and enabling conditions. This included assessing infrastructural capacity (energy, water, logistics), institutional coherence, regulatory predictability, environmental governance, and social legitimacy. Within this framework, ESG is treated not merely as a compliance metric but as a strategic governance interface, a site where global investor expectations, sustainability standards, and domestic developmental priorities intersect. Simultaneously, strategic communication is analysed as a mechanism through which Zimbabwe signals sovereignty, attracts or disciplines capital, and positions itself within global mineral diplomacy. This dual lens allows the study to interrogate whether Zimbabwe's lithium strategy reflects substantive transformation or a form of performative sovereignty, where policy signalling outpaces implementation capacity.

The study acknowledges several limitations. It does not incorporate primary fieldwork, firm-level financial disclosures, or confidential contractual data, and therefore cannot fully resolve micro-level political or commercial dynamics within the lithium sector. Additionally, the rapidly evolving nature of lithium governance, particularly post-2026, introduces temporal constraints, as policy trajectories may continue to shift beyond the study's scope. Nevertheless, these limitations did not detract from the methodological robustness. Given that the research sought to unearth strategic intent, governance logic, and discursive positioning, rather than establish econometric causality, a qualitative interpretive framework, augmented by ESG and strategic communication analysis, provided a rigorous and contextually appropriate approach (Mutlokwa & Okoloise, 2025; Nyamwanza & Bhatasara, 2025).

Mapping of lithium globally is also essential (see Map1) to appreciate and position the Zimbabwe case. Map 1 provides a global spatial representation of lithium deposits and active mining regions, illustrating the geographical concentration of both resources and production. The map reveals that lithium occurs in two dominant geological forms, hard rock deposits (notably in Australia, Zimbabwe, and Canada) and brine deposits (concentrated in South America's "Lithium Triangle" of Chile, Argentina, and Bolivia).



Map 1: The Lithium Triangle and Zimbabwe's dominance in Southern Africa

Source: Adapted from *The Economist* (2017) and *S&P Global Commodity Insights* (2024).

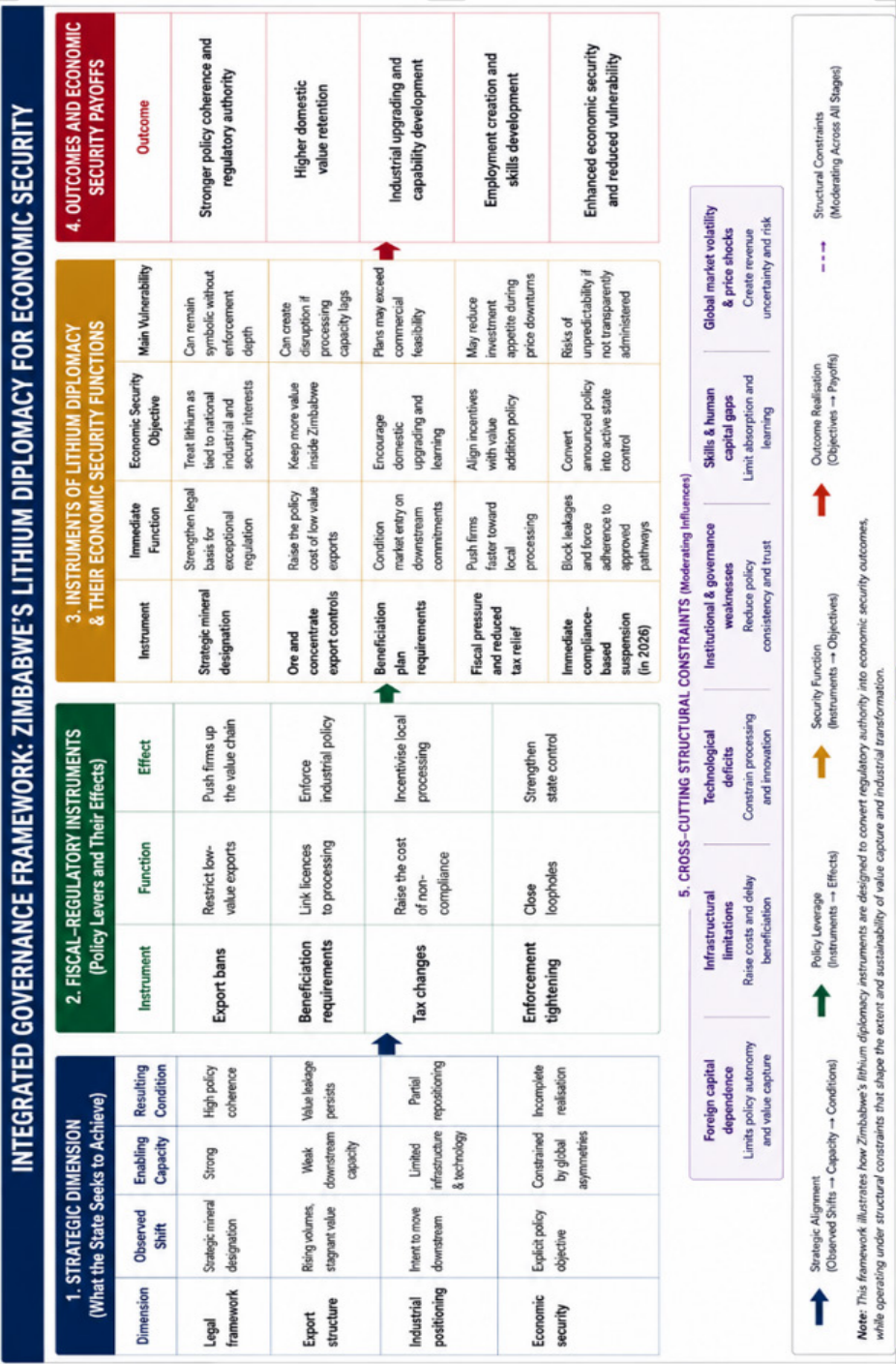


Figure 1: The Integrated Framework: Zimbabwe's Lithium Diplomacy for Economic Security

Positioned within Southern Africa, Zimbabwe thus emerges as a significant hard-rock lithium producer, with major deposits and active mining concentrated in sites such as Bikita, Arcadia (Goromonzi), Sabi Star (Buhera), and Kamativi. When situated within the global lithium map, Zimbabwe occupies a strategically important but structurally upstream position; it is part of a relatively small group of countries contributing to global supply yet remains outside the dominant centres of refining and battery manufacturing.

Document Selection and Source Verification Strategy

The study employed a structured document selection strategy designed to ensure analytical rigour and source credibility. Documents were selected based on four criteria: relevance to lithium governance, publication by recognised institutions or media organisations, temporal proximity to key policy developments between 2022 and 2026, and evidentiary value for understanding Zimbabwe's evolving regulatory framework. A hierarchical approach to source utilisation was adopted. Primary emphasis was placed on official policy documents, statutory instruments, ministerial directives, and government publications. These were supplemented by international agency reports from organisations such as the International Energy Agency (IEA), International Monetary Fund (IMF), African Development Bank (AfDB), and World Bank. Reputable industry and media sources, including Reuters, Xinhua, and S&P Global Commodity Insights, were utilised primarily to capture recent developments not yet reflected in academic literature. Secondary commentary and opinion pieces were used sparingly and only where supported by corroborating evidence from higher-order sources.

Results

The findings reveal a qualitative shift in Zimbabwe's lithium governance regime between 2022 and early 2026, characterised by increasing policy assertiveness, tighter regulatory discipline, and explicit alignment with economic security objectives. However, this strategic escalation is not matched by commensurate institutional, infrastructural, and technological capacity, resulting in a dual condition of strategic ambition and structural constraint. The results are presented through four analytically integrated dimensions: strategic positioning, diplomatic bargaining, industrial policy through beneficiation, and ESG-legitimacy dynamics.

Zimbabwe on the lithium global Map

From analysing the Lithium deposits and mining, mapping, and exploration reports, three key patterns were noted. First, lithium and resource endowments are globally dispersed but unevenly clustered, with South America holding some of the largest reserves, particularly in Bolivia and Argentina (see Map 1), while Australia dominates current production through hard-rock mining. Second, actual mining activity is far more concentrated than deposits, with a small group of countries, Australia, Chile, China, Argentina, and increasingly Zimbabwe, accounting for most of the global output. Third, there is a clear distinction between resource-rich regions and processing centres, as many deposit-rich countries remain primarily extractive, Zimbabwe included, while value-added activities occur elsewhere. Thus, the geography of lithium resources does not coincide with the geography of value capture. Countries such as Zimbabwe are increasingly visible within the global mining landscape, yet their position remains largely upstream, emphasising the strategic importance and difficulty of transitioning from extraction to downstream integration within the global lithium economy.

Thus, regarding Zimbabwe's spatial location, it was noted that there are three critical dynamics. First, it is embedded within a resource-rich but infrastructure-constrained regional context, where proximity to ports, energy systems, and industrial hubs remains a limiting factor for downstream integration. Second, unlike South America's brine-based lithium systems, Zimbabwe's hard-rock deposits allow for faster extraction and scaling, which partly explains its rapid rise in export volumes between 2022 and 2025. Third, despite this production growth, Zimbabwe's position on the map still reflects a geographical separation between extraction zones and value-adding centres, reinforcing its dependence on external processing networks.

Lithium: From commodity to security asset

Zimbabwe's reclassification of lithium as a strategic mineral constitutes a decisive shift from extractive governance to security-oriented resource management, aligning the sector with global transformations in critical minerals policy. The amendment of the Mines and Minerals Act through the Finance Act (2023) institutionalised this transition by enabling differentiated regulation, strategic designation, and enhanced state oversight, effectively embedding lithium within a national economic security framework. This move reflects a broader international trend in which states treat lithium as a strategic input into

industrial resilience, technological competitiveness, and geopolitical positioning (IEA, 2025a; Müller, 2023; Overland, 2023). Zimbabwe’s export performance provided a clear diagnosis of the structural problem underpinning this policy shift. To ground the structural contradiction between rising extraction and stagnant value realisation, Table 1 presents Zimbabwe’s recent lithium export performance, highlighting the divergence between output growth and revenue outcomes.

Table 1: Lithium Export Performance and Value Realisation (2024-2025)

Indicator	2024	2025	Change (%)	Implication
Spodumene export volume (million tonnes)	1.014	1.128	+11.2%	Expansion in extraction capacity
Export earnings (US\$ million)	514.5	513.8	−0.1%	Value stagnation despite higher output
Implied unit value (US\$/tonne)	~507	~455	−10.3%	Declining price realisation

Source (Authors compilation from research notes, 2026)

The evidence reveals a clear decoupling between production volume and value realisation. Although output increased markedly, export revenues remained largely unchanged, while implied unit prices declined by more than 10%. This indicates that expansion in extraction alone does not yield proportional economic gains, particularly within volatile commodity markets.

The finding is significant as it substantiates the structural limitations of upstream positioning within the lithium value chain. Such positioning is typically associated with price-taking dynamics in global markets, minimal influence over value determination, and heightened vulnerability to cyclical price fluctuations. By contrast, the bulk of value accrues in downstream segments, namely refining, chemical conversion, and battery manufacturing, where firms exercise greater pricing power, accumulate technological capabilities, and capture higher margins (Moerenhout et al., 2023; IEA, 2025a).

To further contextualise this structural imbalance between extraction and value capture, Figure 2 illustrates the distribution of value across the global lithium-ion battery supply chain, highlighting the pronounced shift in economic rents from upstream mining to downstream processing and manufacturing stages.

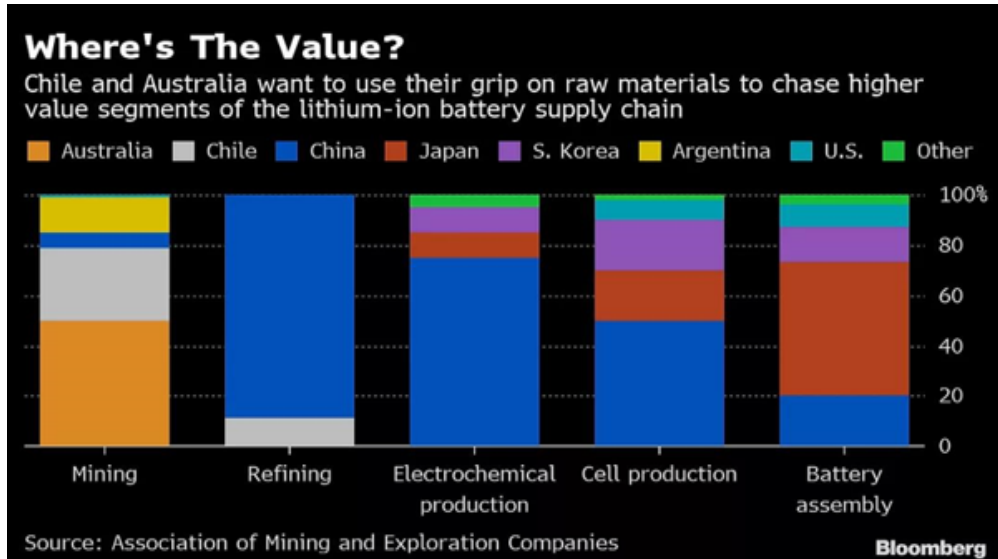


Figure 2: Global Distribution of value across the global lithium-iron battery supply chain

Source: Authors' reconstruction based on data from the Association of Mining and Exploration Companies (AMEC), as reported by Bloomberg.

Figure 3 paints a **highly uneven distribution of value across the lithium supply chain**, where upstream mining, dominated by countries such as Australia and Chile, captures only a marginal share of total value. In contrast, downstream stages, particularly refining, electrochemical processing, and battery manufacturing, are overwhelmingly concentrated in technologically advanced economies, notably China, Japan, and South Korea. This configuration confirms that **control over processing and manufacturing, not resource endowment, determines value capture**, reinforcing the structural disadvantage of extraction-dependent producers such as Zimbabwe.

To further unpack the technical and industrial structure underpinning value creation, Figure 3 maps the established processing pathways from raw lithium extraction through conversion to final battery-grade products, illustrating where critical transformation, and thus value addition, occurs along the chain

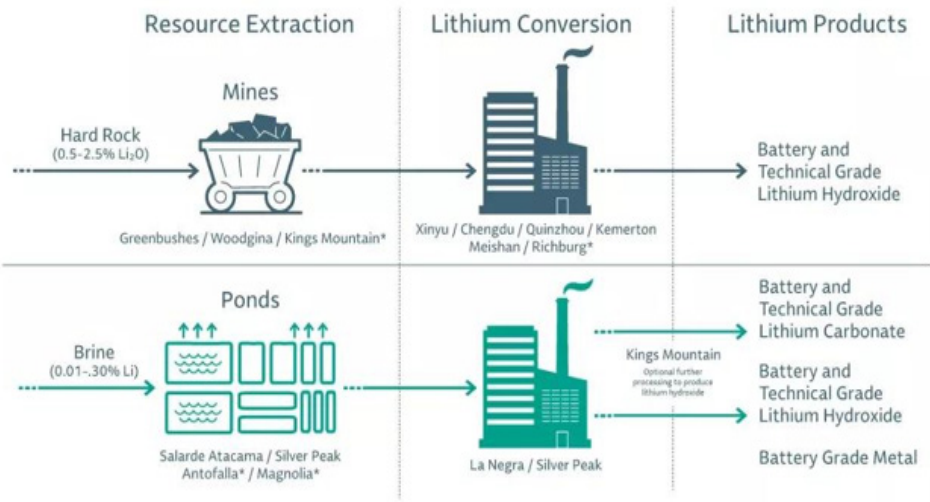


Figure 3: Sketch for Lithium ore processing
Source: Authors' adaptation based on International Energy Agency (2022), Roskill; Benchmark Mineral Intelligence (2023).

To further situate Zimbabwe's position within the global lithium political economy, Figure 3 presents the distribution of refining capacity across key battery minerals, highlighting the pronounced concentration of downstream processing power in a limited number of countries.

China's share of global battery raw material refining capacity

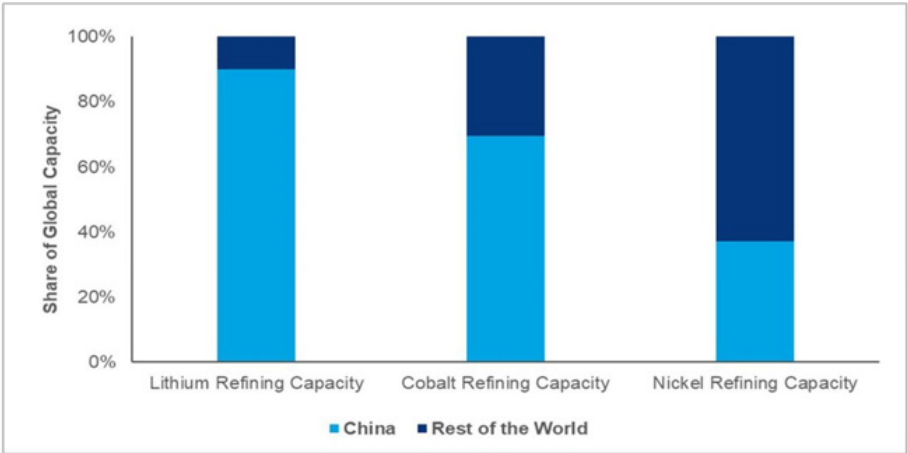


Figure 4: China's share of global lithium refining capacity
Source: Wood Mackenzie (2021)

Figure 4, read in the context of Figures 1 and 2, reveals a highly concentrated global refining architecture, with China accounting for the dominant share of lithium, cobalt, and nickel processing capacity. In lithium specifically, China was noted as controlling most of the refining, while similar patterns are observed across cobalt and nickel, albeit with slightly more distributed participation. This concentration is analytically significant because it demonstrates that control over downstream processing, not resource ownership, determines strategic power and value capture within the battery economy. For resource-rich but processing-poor countries such as Zimbabwe, this creates a structural dependency: even where extraction expands, value realisation remains externally mediated through foreign-controlled refining networks. Consequently, Zimbabwe's push for beneficiation can be interpreted as an attempt to disrupt this concentration, although the scale of global capacity asymmetries stresses the difficulty of such a transition.

Zimbabwe's historical positioning at the extraction stage structurally constrains its ability to capture meaningful economic rents, reinforcing its marginal role within the global lithium value chain. In response, the strategic designation of lithium represents a deliberate policy recalibration, from a focus on extraction to one of positionality within higher-value segments of the supply chain. The objective has shifted from maximising output to repositioning Zimbabwe within downstream nodes, reflecting a broader transition from a comparative advantage paradigm, grounded in resource endowment, to a strategic industrial paradigm centred on value chain upgrading and economic security. However, the findings indicate that this transition remains only partially realised. While the legal and policy frameworks articulate a coherent and globally aligned strategic intent, the enabling conditions required for downstream integration remain uneven, characterised by persistent energy constraints, limited domestic refining infrastructure, continued technological dependence on foreign firms, and institutional fragmentation in policy implementation. The result is a condition of asymmetric transformation, in which strategic ambition advances more rapidly than the material and institutional capacities required to sustain it.

To synthesise the relationship between policy ambition and material capacity (in Figure 1) presents a structured comparison of Zimbabwe's strategic shifts in lithium governance against the enabling conditions that shape their realisation. The designation of lithium as a strategic resource was also noted as performing a critical signalling function, communicating to international investors and

partners that Zimbabwe is committed to value addition, responsible resource governance, and alignment with global energy transition priorities, while seeking to reposition itself within sustainable supply chains. However, the effectiveness of this signalling is contingent upon credible implementation. Where regulatory ambition is not supported by adequate infrastructure, institutional capacity, and transparency, policy risks being interpreted as performative sovereignty, a projection of strategic control that is not matched by corresponding material capability. Thus, the findings generally demonstrate that Zimbabwe's reclassification of lithium as a strategic resource is empirically justified and theoretically coherent, grounded in the observed failure of volume-based extraction to generate economic security. However, the transition from commodity to security asset remains structurally incomplete, constrained by downstream capacity deficits and global value chain asymmetries. In effect, Zimbabwe has successfully redefined the problem, from extraction to value capture, but has yet to fully resolve the conditions necessary for transformation.

From the study, therefore, the evolution and escalation of Zimbabwe's lithium policy regime is summarised in Table 3, which outlines the key governance milestones between 2022 and 2026, highlighting the progressive shift from export control measures to a more comprehensive framework of strategic regulation and disciplinary enforcement.

Table 3: Major milestones in Zimbabwe's lithium governance, 2022 to 2026

Period	Policy move	Immediate objective	Broader strategic meaning
December 2022	Ban on export of beneficiated lithium ore	Stop raw ore outflows and encourage local processing	First clear move toward lithium as a strategic industrial mineral
November to December 2023	Requirement that miners submit beneficiation plans by March 2024; no new licences without approved plans	Tie future investment to downstream commitments	Shift from export control to developmental conditionality
2023 legal reform	Lithium is designated a strategic mineral under the Finance Act	Create a stronger legal basis for differentiated state control	Formal securitisation of lithium within mining law

Period	Policy move	Immediate objective	Broader strategic meaning
June 2025	Announcement that lithium concentrate exports would be banned from January 2027	Push firms from concentration toward chemical conversion	Stronger insistence on in-country value addition
February to March 2026	Immediate suspension of raw mineral and lithium concentrate exports, later endorsed by the Cabinet	Tighten compliance and address malpractices and leakages	Transition from signalling to active disciplinary enforcement

Source: Government of Zimbabwe (2023a; 2023b), IEA (2025b; 2025c), Reuters (2025a), Ministry of Mines and Mining Development (2026), and Xinhua (2026).

Fiscal pressure and hardening of the value addition policy

A key result was the integration of fiscal instruments into Zimbabwe’s lithium governance (see Figure 1), marking a shift from isolated export controls to a more coordinated economic statecraft approach. The planned removal of mining tax incentives by 2025 signals a transition toward using tax policy alongside regulation to compel beneficiation and domestic value addition (S&P Global Commodity Insights, 2024). However, fiscal pressure notably triggered strategic firm responses. Evidence from Xinhua (2026) shows that firms increased exports and permit applications ahead of enforcement, front-loading production to avoid new restrictions. This prompted the government to accelerate implementation timelines.

Table 5: Key Tension

Policy Goal	Firm Response	Implication
Promote beneficiation	Delay or hedge investment	Requires stable policy sequencing
Restrict exports	Pre-enforcement export surge	Needs credible, timely enforcement

Thus, the key result in this regard was that Zimbabwe’s lithium policy evolved into a fiscal–regulatory regime to strengthen value retention efforts. However, its effectiveness depended on policy timing, sequencing, and credibility, as firms actively adapted to regulatory signals.

Trends in lithium governance in Zimbabwe

The defining development noted at the time of the study was the shift from phased regulation to immediate, compliance-driven enforcement, thereby hardening Zimbabwe's lithium governance regime. Initially, policy followed a forward-looking transition model: in June 2025, authorities announced that lithium concentrate exports would be prohibited from January 2027, allowing time for adjustment towards higher-value products such as lithium sulphates (IEA, 2025c). However, this trajectory was found to have been abruptly altered in early 2026. The Ministry of Mines and Mining Development imposed an immediate suspension of lithium concentrate and raw mineral exports in February 2026, subsequently ratified by Cabinet in March (Ministry of Mines and Mining Development, 2026; Xinhua, 2026). This represented a decisive shift from policy signalling to enforcement urgency.

The rationale for this acceleration is significant. Evidence from Xinhua (2026) indicated that firms responded to the initial notice period with strategic front-loading, increasing production, export volumes, and permit applications to maximise extraction before restrictions took effect. This exposed regulatory leakage, prompting the state to intervene pre-emptively in what it framed as the national interest. This episode reframed lithium governance as not only an issue of industrial policy but also of enforcement credibility and administrative control. Reports of export malpractices (Reuters, 2026b) further reinforced the state's perception that gradualism was being exploited, necessitating a more assertive regulatory stance.

The transition from phased prohibition to immediate suspension reflecting a move toward "enforcement-led mineral governance", where the state prioritises closing regulatory gaps over maintaining policy predictability. While this strengthens Zimbabwe's strategic posture, it simultaneously exposes a core tension. For instance, the state has been attempting to enforce a high-value industrial model before fully establishing the domestic ecosystem required to sustain it. This results in a governance configuration characterised by strategic gravitas, but institutional impatience, where ambition to capture value is clear, but the material and administrative foundations for that transformation remain uneven. Figure 1 unpacks the operational logic of Zimbabwe's lithium strategy. Key policy instruments are deployed as part of its emerging lithium diplomacy, linking each tool to its immediate function, underlying economic security objective, and associated vulnerabilities.

Discussion

Results noted in this study make one reflect that Zimbabwe's lithium strategy cannot be adequately captured as either orthodox resource nationalism or a coherent developmental state project. Rather, it represents a contingent and adaptive form of constrained resource sovereignty, enacted within a structurally unequal global system characterised by technological dependence, infrastructural deficits, volatile commodity cycles, and asymmetric bargaining power (Andreoni et al., 2023; Aklin & Urpelainen, 2023). From an international relations perspective, this positions Zimbabwe within a broader pattern of Global South states attempting to leverage critical minerals for strategic repositioning yet doing so under conditions that limit policy autonomy and developmental outcomes.

Moreover, the efficacy of lithium diplomacy is mediated by ESG performance and governance credibility. Emerging evidence from Zimbabwe points to persistent tensions, including limited contractual transparency, weak public participation, artisanal miner exclusion, labour precarity, displacement, and environmental risks (Chilunjika, 2020; Mutlokwa & Okoloise, 2025; Nyamwanza & Bhatasara, 2025; Takura, 2026). These factors not only undermine the social licence to operate but also weaken the state's diplomatic and bargaining position in an era where ESG compliance increasingly conditions access to finance, markets, and strategic partnerships.

The findings presented in this study provide the basis for reinterpreting Zimbabwe's lithium strategy as an emergent form of critical minerals diplomacy. The evidence shows that the country is structurally constrained by the very global asymmetries it seeks to overcome. Three interrelated arguments emerge, and these are that, firstly, Zimbabwe has successfully internalised the global logic of critical mineral securitisation. Secondly, the policy regime represents a hybrid and evolving form of constrained resource sovereignty, and finally, the effectiveness of this strategy is fundamentally limited by gaps in material capacity, institutional coordination, and ESG legitimacy. These tensions collectively define the thrust of the paper.

Evidence from Zimbabwe's major lithium operations illustrates (see Appendix 1) the practical realities of the country's evolving lithium diplomacy. The Bikita Mine, controlled by Sinomine Resource Group, was noted as being one of the oldest and most established lithium operations, with ongoing investments

in processing capacity aimed at supporting beneficiation objectives. The Arcadia Project, owned by Zhejiang Huayou Cobalt, was found to be the largest contemporary investment and is a focal point for discussions regarding downstream processing commitments and local value addition. The Sabi Star Project has similarly attracted substantial foreign capital, positioning itself as a strategically important contributor to national lithium output. Meanwhile, the Kamativi Lithium Project demonstrates efforts to revitalise previously dormant mining assets through new investment and exploration activities. Collectively, these projects reveal both the opportunities and constraints of Zimbabwe's beneficiation agenda. While significant capital inflows have expanded extraction and processing capacity, ownership remains heavily concentrated among foreign firms, particularly Chinese investors, highlighting the continuing challenge of translating resource control into broader industrial transformation.

As demonstrated, the results strongly affirm the core proposition in the literature that critical minerals have transitioned from commodities to strategic assets embedded in economic security and geopolitical competition (IEA, 2025a; Farrell & Newman, 2023; Overland, 2023). Zimbabwe's reclassification of lithium as a strategic mineral, alongside export controls and beneficiation mandates, reflects a clear alignment with this global shift. As demonstrated in the results, the decoupling between rising export volumes and stagnant revenues provides empirical validation of the argument that upstream extraction is structurally insufficient for economic security. This directly supports the literature's contention that value is concentrated downstream in refining and manufacturing, and that control over these segments determines both economic rents and strategic power (Moerenhout et al., 2023). In this regard, Zimbabwe's policy trajectory is not anomalous but consistent with broader efforts by resource-rich states to reposition themselves within global value chains.

The evidence also suggests that Zimbabwe's strategy is best understood not as a fully realised developmental state project, but as a form of constrained resource sovereignty. This concept captures the hybrid nature of the policy regime: while the state has increased regulatory control and strengthened its bargaining position, it remains dependent on foreign capital, external technology, and globally concentrated processing networks. As highlighted in the literature, particularly in studies of Africa and Latin America, such conditions produce a structural contradiction, enhanced geopolitical relevance without corresponding industrial autonomy (Müller, 2023; IMF, 2024; Riofrancos,

2020). The dominance of foreign firms, especially within upstream operations, reinforces this asymmetry, limiting the extent to which regulatory assertion can translate into substantive value capture.

This contradiction is further deepened by the evolution of Zimbabwe's policy instruments. The results show a clear progression from export bans to beneficiation requirements, fiscal pressure, and ultimately enforcement-led governance. This escalation reflects an increasingly assertive state attempting to discipline capital and internalise value. Yet, as the literature on resource nationalism cautions, such strategies are only effective when supported by coherent policy sequencing and enabling infrastructure (Saunders, Mlambo & Ovadia, 2023; Barakos, 2022). The observed shift from phased prohibition to immediate suspension exemplifies this tension. While it enhances state credibility in the short term by closing regulatory loopholes, it also introduces uncertainty and highlights the absence of a fully developed domestic processing ecosystem. In this sense, Zimbabwe's policy regime embodies what may be termed "institutionally compressed industrialisation", which is an attempt to accelerate value chain upgrading through regulatory force rather than gradual capability accumulation.

From a strategic communication perspective, this escalation also reveals the dual nature of lithium diplomacy as both material governance and discursive signalling. As outlined in the introduction, states increasingly use policy instruments not only to regulate markets but to signal intent, credibility, and alignment with global norms (Cornut & Paquin, 2022; Sachs et al., 2022). Zimbabwe's strategic mineral designation, export controls, and ESG-oriented rhetoric collectively function as signals to international investors and partners that the country is committed to value addition and responsible resource governance. However, the findings suggest that this signalling risks being interpreted as performative sovereignty if not matched by implementation capacity. This reinforces a key insight from the literature: in the era of ESG-sensitive investment, credibility is not derived solely from policy ambition, but from consistent, transparent, and predictable execution (León et al., 2023; Sovacool et al., 2020).

The ESG dimension is particularly critical in assessing the long-term viability of Zimbabwe's lithium diplomacy. The results demonstrate that governance gaps, especially in community participation, artisanal inclusion, and environmental management, pose significant risks to the social licence to operate. This aligns

with global debates on green extractivism, where the energy transition may reproduce historical inequalities if governance frameworks fail to ensure equitable distribution of costs and benefits (Nyamwanza & Bhatasara, 2025; Jerez et al., 2021). In Zimbabwe's case, the exclusion of artisanal miners and limited community engagement highlight a tension between state-centric control and inclusive development. As the literature suggests, economic security must be understood not only in terms of national revenue or strategic positioning, but also in terms of social legitimacy and sustainability (Mutlokwa & Okoloise, 2025). Without this, lithium diplomacy risks consolidating rents at the centre while generating localised conflict and resistance.

The findings revealed that the legitimacy of Zimbabwe's lithium strategy depends not only on regulatory effectiveness but also on its capacity to satisfy ESG expectations. Emerging evidence points to persistent governance challenges, including limited community participation, concerns regarding land access and displacement, uneven benefit-sharing arrangements, labour-related grievances, and the marginalisation of artisanal mining communities. Studies by Mutlokwa and Okoloise (2025), Nyamwanza and Bhatasara (2025), and Takura (2026) suggest that local communities often perceive themselves as insufficiently integrated into decision-making processes despite bearing many of the environmental and social consequences associated with mining expansion. Similar concerns have been documented around major projects such as Bikita and Arcadia, where stakeholder engagement and local development expectations have not always aligned with operational realities. These findings emphasise the importance of integrating community participation, social accountability, and environmental stewardship into the broader architecture of lithium diplomacy if long-term legitimacy and economic security objectives are to be achieved.

Furthermore, the findings complicate prevailing assumptions about beneficiation as a straightforward pathway to development. While the policy emphasis on value addition is theoretically sound and widely supported in the literature, the Zimbabwean case illustrates that beneficiation is neither automatic nor inherently developmental. It is contingent on a complex set of enabling conditions, including energy reliability, infrastructure, technological capability, and coordinated industrial policy (IEA, 2025a; Wang et al., 2024). The absence of these conditions transforms beneficiation from a developmental instrument into a policy aspiration, reinforcing the gap between intent and

outcome. This underlines a broader theoretical point: value chain upgrading is not achieved through regulatory fiat alone, but through systemic capability building.

Although beneficiation is widely promoted as a pathway to industrial transformation, its implementation remains constrained by infrastructural limitations. Lithium processing is energy-intensive and requires a reliable electricity supply, substantial water resources, efficient transport corridors, and specialised industrial infrastructure. Zimbabwe faces recurrent electricity shortages, logistics bottlenecks, and limited domestic refining capacity, all of which increase operational costs and reduce competitiveness. Furthermore, downstream processing requires sophisticated technological capabilities and skilled human resources that remain concentrated in established processing hubs outside Africa. These constraints suggest that beneficiation should not be viewed as a standalone policy solution but rather as one component of a broader industrial strategy requiring coordinated investment in energy systems, transport infrastructure, technological learning, and institutional capacity development.

Taken together, these dynamics suggest that Zimbabwe's lithium strategy represents a partial but significant departure from enclave extraction yet falls short of achieving structural transformation. It is "partial" because it successfully redefines the problem, recognising that economic security requires control over value rather than volume, but does not fully resolve the conditions necessary to achieve this transformation. This aligns with the paper's central argument that lithium diplomacy, while conceptually robust, remains incomplete without complementary investments in infrastructure, governance, and institutional capacity.

The broader implication of this discussion is that Zimbabwe's experience reflects a generalisable challenge for resource-rich developing states in the energy transition. As the literature indicates, critical minerals create a window of opportunity for repositioning within global value chains, but this opportunity is mediated by structural constraints that limit policy autonomy (Andreoni et al., 2023; Aklin & Urpelainen, 2023). Zimbabwe's strategy demonstrates both the possibilities and the limits of this moment: it shows that states can enhance their bargaining power and assert greater control, but also that structural transformation requires more than regulatory intervention; it requires coordinated, long-term capability development and inclusive governance.

The central thrust of the paper, therefore, is that lithium diplomacy can only deliver economic security when regulatory ambition is matched by material capacity, institutional discipline, and social legitimacy. Without this alignment, there is a risk that Zimbabwe's strategy will reproduce the very patterns of externalised value capture it seeks to overcome, albeit under a more interventionist and strategically articulated regime.

The evidence presented throughout this study suggests the emergence of what may be termed the 'Interventionist Enclave Extraction'. Unlike traditional enclave extraction, where the state plays a limited regulatory role, interventionist enclave extraction is characterised by heightened state involvement through export controls, beneficiation mandates, strategic mineral designation, and fiscal interventions. However, despite increased regulatory assertiveness, value creation remains largely concentrated outside national borders due to continued dependence on foreign capital, external processing infrastructure, and internationally concentrated technological capabilities. Stronger state intervention alone does not necessarily guarantee structural transformation. Instead, it may result in a more regulated version of extraction that continues to externalise higher-value activities while enhancing domestic control over upstream production.

Conclusion

This paper has argued that Zimbabwe's critical minerals policy is best conceptualised as an emergent project of lithium diplomacy, pursued in the name of economic security within the global energy transition. At its core lies a clear structural diagnosis: when lithium is exported in low-value forms such as ore or concentrate, the decisive stages of value creation, refining, chemical conversion, and technological learning are externalised, leaving Zimbabwe with only a marginal share of the mineral's strategic value. The state's policy response since late 2022 reflects an increasingly assertive attempt to address this imbalance. Through a sequence of measures, including the ban on unbeneficiated lithium exports, mandatory beneficiation plans, strategic mineral designation, the planned termination of concentrate exports, and the 2026 immediate suspension of raw and concentrate exports, Zimbabwe has sought to convert geological endowment into regulatory leverage and industrial bargaining power.

The evaluation of this strategy, however, remains necessarily qualified. While Zimbabwe has correctly identified value addition as the central pathway

to economic security, its implementation is constrained by structural and institutional limitations. These include persistent energy deficits, infrastructural gaps, governance weaknesses, foreign dominance in key segments of the sector, limited domestic processing capacity, and insufficient local participation. Contemporary scholarship consistently demonstrates that governance quality, civil society engagement, artisanal inclusion, and environmental justice are not peripheral concerns but foundational to the legitimacy and sustainability of mineral-based development. In this respect, economic security must, thus, be understood in a broadened sense: regulatory control over exports, in the absence of domestic capacity and social legitimacy, may enhance state authority without necessarily producing durable developmental outcomes.

The broader implication, as the paper has shown, is that critical minerals, in themselves, do not guarantee transformation. They create strategic opportunities, and the paper was quick to note that that opportunity must be institutionally structured through coordinated policy, infrastructure development, technological capability, and inclusive governance. The paper also demonstrated that Zimbabwe has taken an important strategic step by rejecting the role of a low-value supplier within a high-value global chain. Yet the success of this repositioning, as cautioned, will depend on the next phase: disciplined policy execution, sustained investment in enabling infrastructure, regulatory transparency, and the construction of a socially inclusive mining regime. If these elements are effectively aligned, lithium diplomacy can evolve into a genuine pillar of economic security, enabling Zimbabwe to capture greater value and participate more meaningfully in the global energy transition. If not, there remains a significant risk that the country will reproduce familiar patterns of externalised value capture, albeit under a more interventionist and strategically articulated framework, where stricter export controls coexist with a largely unchanged political economy of dependency, now reframed through the language of green transition.

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Appendix

Empirical Evidence from Zimbabwe's Major Lithium Projects			
Key operational and investment characteristics of Zimbabwe's leading lithium projects			
1. BIKITA MINE	2. ARCADIA PROJECT	3. SABI STAR PROJECT	4. KAMATIVI LITHIUM PROJECT
			
Location Bikita, Masvingo Province	Location Arcadia, Mashonaland East Province	Location Kadoma, Mashonaland West Province	Location Kamativi, Mashonaland West Province
Owner Sinomine Resource Group	Owner Zhejiang Huayou Cobalt Co. Ltd.	Owner Sabi Star Mining (Pvt) Ltd	Owner Various (including strategic investors and developers)
Status Operating since 2006 (one of the oldest lithium mines in Zimbabwe)	Status Operating (largest contemporary lithium investment in Zimbabwe)	Status Operating	Status Under redevelopment / Exploration and early-stage development
Main Activities Spodumene mining and concentrate production	Main Activities Spodumene mining, concentrate production and downstream processing (Stage 1-2)	Main Activities Spodumene mining and concentrate production	Main Activities Exploration, resource delineation and project development
Key Developments Investments in processing plant expansion to support beneficiation objectives	Key Developments Phased investments in conversion plant to produce battery-grade lithium chemicals	Key Developments Expansion of plant capacity and exploration of downstream partnerships	Key Developments Revival of dormant assets through new investment and exploration drilling
Strategic Importance Established producer contributing significantly to national lithium output	Strategic Importance Flagship project for local value addition and industrial upgrading	Strategic Importance Major contributor to national production and export earnings	Strategic Importance Unlocking new resources and revitalising underutilised assets
CROSS-CUTTING EVIDENCE AND IMPLICATIONS			
 Capital Inflows Substantial foreign investment, mainly from Chinese firms, has expanded extraction and processing capacity.	 Ownership Concentration Major projects are owned predominantly by foreign investors, limiting domestic control and value capture.	 Beneficiation Progress Some progress in local processing and conversion (capacity expansion at Bikita and Arcadia).	 Structural Constraints Challenges include energy reliability, infrastructure deficits, skills gaps and financing limitations.
 Implication for Policy Need for stronger governance, local participation and enforceable beneficiation commitments to achieve industrial transformation.			
These projects illustrate both the opportunities and constraints of Zimbabwe's lithium diplomacy: resource endowment is substantial, but translating it into broad-based industrial and economic security requires deeper local capabilities, strengthened institutions and sustained policy coherence.			