

africappractice

+ + +

+ + +

+ + +

When the rules **break**

Africa enters this moment with the standing to rewrite rules it never agreed to.
Here is what that means for every organisation operating here on the continent.

March 2026

What **20 years** teaches you



When I established Africa Practice in 2003, Africa had reached what felt like a genuine turning point. The private sector was investing. Economies were outperforming the rest of the world. Technical assistance funding was flowing in, and for the first time in decades, Africa wasn't just on the map, it was becoming the priority. It was a rare moment of alignment where global investor appetite finally met the scale of African potential.

I believed then, as I believe now, that Africa's future would be defined by sovereign ambition, equitable partnerships, and a private sector that understood both. If the structural conditions allowed, the underlying demographics and the continent's extraordinary natural capital endowment would do the rest.

Africa's exposure to the 2008 financial crisis, its isolation during the pandemic, and its ongoing vulnerability to commodity price swings and foreign exchange volatility have made the need for structural reform only more urgent. The global system that produced those shocks was not neutral. It was built, over decades, to generate precisely this outcome: **a continent with extraordinary assets, yet limited control over how they are valued, and almost no say in the rules governing the exchange.**

“ I was wrong about how long the **cycle of growth** would hold.

I was not wrong about the **structural problem** beneath it. ”

My frustration at the scale of this systemic marginalisation has grown every year. So has my conviction that the mechanism to disrupt it exists - if we are willing to name it clearly and move with deliberate intent.

Over the past year, the world has shifted significantly. Yet the problem has not changed. What has changed is the leverage.

The rules that kept Africa's interests off the table are no longer being enforced. The global governance architecture that institutionalised great power control in a handful of states is fracturing. Competition for Africa's resources is rewriting the terms of engagement. The continent that holds vast amounts of the world's mineral reserves, the most genetically diverse population on earth, and a young working-age population, is no longer negotiating from a position of dependence.

That is why I asked an eclectic group of minds across our organisation to determine what this moment actually represents - not as a trends exercise, but as a strategic reckoning. What follows is not a forecast. It is our position. On four shifts already underway. On what they require from organisations operating here. And on a window that is open now but will not stay open indefinitely.

“ Thirty years of watching this continent be underestimated, undervalued, and outmanoeuvred has not diminished my belief that **Africa's moment is arriving. It has sharpened my impatience to make sure **we are ready** for it. ”**

Marcus Courage

Founder & CEO, Africa Practice

The **terms** are changing

Africa is no longer a prize to be divided among others. Today, we are the foundation of the future, yet most organisations have not yet accounted for this.

No Green Revolution can occur without African cobalt and lithium. The continent contains vast quotas of the world's mineral resources and hosts a quarter of global biodiversity. There will be no AI Revolution without African data, and the global pharmaceutical industry, which has hit a ceiling, cannot develop precision medicine for humanity without Africa. We are the world's biobank, with the most genetically diverse population on Earth. And the ageing world cannot be sustained without Africa's youthful workforce. By 2050, 1 in 4 people on Earth will be African.

The rules-based order that Western leaders are now mourning was never neutral. As the writer China Miéville sharply noted, *"between equal rights, the force decides."* For decades, Africa did not lack rights. It lacked the force to ensure they were respected. We saw the mask slip during COVID-19, when global trade rules were discarded in favour of vaccine nationalism. We knew it had fallen entirely when long-standing health and aid funding agreements were being replaced by ownership of national population health and genomics data. These are not failures of the system. They were the system - working exactly as designed, for those with the power to set its terms.

by 2050



1 in 4 people on Earth will be African

Africa's leverage has always existed. What is changing is that the **rules that kept the continent from the decision-makers' table are **no longer being enforced**.**

The current readjustments on the world stage will be as transformative for Africa as the transition to independence in 1960. The decisions made at that time shaped this continent for over sixty years. Africa took back its independence from direct control, but entered a global system that embedded significant great power, influence, and control in a limited number of states. The shape of that order endured through every transition until now. The decisions taken in this moment carry the same strategic weight as decisions did back then. However, this time we must not merely pursue autonomy. We must use the leverage we have as a continent to ensure Africa is not only present in the evolving world order, but an active participant in establishing it.

Humans have a tendency to be fearful of change - to assume that the conditions we are experiencing are uniquely difficult and therefore unmanageable. But the patterns are readable to anyone willing to understand them. We have witnessed great powers rise and fall. We have experienced the economic impact of their decline as trade corridors were required to adjust. We have observed how technology has altered the nature of employment and how governments have evolved due to changes in the distribution of power and demographics. **This is not the first time the terrain has shifted.**

However, it is the first time that **Africa enters the adjustment with as much to gain.**

Africa never fully built the infrastructure, the pension obligations, and the fiscal frameworks that richer economies are now trapped in. **This is not a deficit. This is the opportunity to build directly for the economy that is coming, to bypass the 20th-century models, which the remainder of the world cannot avoid.**

Four shifts are already underway. They form a chain - each one making the next inevitable.



Value sovereignty

The world has transitioned from a reliance on rules to a reliance on power, and Africa has leverage it has never had the capacity to apply.



Economic revolution

The economic model that supported the nation-state of the 20th century is ending, and the window to construct something different is now open - but not indefinitely.



Government in the crossfire

The nation-state is caught in the crossfire, and the primary institution that every strategy in Africa relies upon is degrading faster than many participants have recognised.



Civic inflection point

Africa's youth - the youngest population in the world, born digital, and never benefiting from the economic models now being discarded - are developing what follows next.

It is up to us to determine how Africa reshapes the global system - **and itself.**



Value sovereignty

Set the terms

**The minerals, the data, and the genomics are African.
The value chain is not.**

70% < 3%

The continent holds 70% of the world's cobalt and the critical lithium and copper required for the global energy transition. It captures less than 3% of the value chain.¹

Africa is currently trapped in a cycle of value export. In 2019, Manufacturing Value Added (MVA) per capita across the continent was USD 212 - less than half the USD 500 average for other developing economies.

MVA growth was negative between 2010 and 2019. The result is a scissors effect: nations export raw wealth while importing expensive finished goods. Manufactured goods now account for between 88% and 94% of total imports across African Regional Economic Communities. We are exporting the physical ingredients of the future only to buy them back as high-priced, finished technologies.

This extraction has moved beyond the soil and into our very biology. **Africa bears 25% of the global disease burden but accounts for only 2% of global medical research.** Most recently, the largest global health donor pulled decades of commitments while negotiating ownership of our population's genomics data - a pairing that left little ambiguity about intentions.

The US Inflation Reduction Act made Africa's critical minerals central to the global clean energy transition. Its reversal has not reduced that dependency; it has simply removed the rules governing it. With China's dominance in mineral processing unchanged, Africa remains the primary prize of Resource Nationalism 2.0 - a new great game where resources are not commodities but the primary levers of statecraft. The rules of that game are being written now. **The question is not whether Africa will be at the centre of the next fifty years of global economic history. It is whether Africa will be setting the terms or inheriting them.**

The future we want

A new era of integrated value sovereignty - Africa transitioning from resource pool to development and processing hub, maximising the value of its natural resources, environmental wealth, data, and intellectual property. The continent holds the permanent equity of the future. **Whether the deals being signed right now reflect that, or quietly sign it away, is the question that is on every negotiating table.**

Old terms

Africa as price-taker - exporting cobalt, lithium, and genomic data as raw commodities, buying them back as finished technologies at prices set elsewhere. Access structured with limited requirements for local manufacturing, technology transfer, or equity in the value chain.

That is not trade. That is the extraction trap.

New terms

Namibia, Ghana, and Zimbabwe have moved to ban raw ore exports, compelling miners to invest in local refineries. Resource Nationalism 2.0 in practice - a sophisticated shift toward owning the refineries, the laboratories, and the intellectual property.

What we have: minerals, data, and natural assets.

¹ United Nations Economic Commission for Africa, "Producing Battery Materials in the DRC Could Lower Supply Chain Emissions and Add Value to African Economies," November 24, 2021, <https://www.uneca.org/stories/producing-battery-materials-in-the-drc-could-lower-supply-chain-emissions-and-add-value-to>.



Economic revolution

Tax the machine and value the human

The window to build differently is open now. Not indefinitely.

60%

of jobs in advanced economies are exposed to AI.² The ramifications have not yet been properly anticipated.

The consequences of cognitive displacement have not been fully anticipated. That is not a lag in awareness. It is a lag in redesign. AI is moving aggressively into cognitive domains once considered safe – legal strategy, creative production, middle management. Roughly half of the jobs exposed to AI face true automation, not augmentation.³ **The human is removed from the loop entirely.**

For decades, the standard advice to Africa has been to follow the path of China or Vietnam: use cheap labour to build a manufacturing base. That door is now closed. **It is impossible to compete with a USD 1-an-hour robot performing the same tasks more efficiently, 24/7.** The social contract of working forty years for a pension is becoming obsolete as economic output decouples from human hours.

This creates a terminal fiscal paradox with massive ramifications. The 20th-century state is funded almost entirely by the sweat of the brow. As automation displaces labour, the traditional tax base erodes at the exact moment when demographic shifts require higher levels of social support. Every strategy on this continent that assumes a revenue-generating state at its centre is built on a crumbling foundation.

The future we want

Africa moves straight into the high-value human economy; care, community, and creativity as the new premium sectors, ensuring that value captured from machine intelligence and automation supports the collective public good. The policy instruments are already visible: robot and data taxes, universal basic income as a market floor, and human-in-the-loop oversight standards. This is not a transition to be managed. It is a leapfrog to be taken.

Every model for capturing value from the leapfrog assumes a state capable of holding the regulatory ground. That assumption deserves more scrutiny than most strategies currently give it.

Old terms

Governments are passing sophisticated laws for local manufacturing while struggling to provide the electricity to run those very factories. The private sector is stepping in as the de facto provider of energy, logistics, and security.

That assumption that the state can reliably hold the centre is the exposure.

New terms

Africa was never locked into the legacy industrial infrastructure, the pension obligations, and the fiscal frameworks that richer economies cannot escape.

That is not a disadvantage. African economies are the only ones without a sunk cost in what is becoming obsolete.

² World Economic Forum, The Future of Jobs Report 2025 (Geneva: World Economic Forum, 2025), n., https://reports.weforum.org/docs/WEF_Future_of_Jobs_Report_2025.pdf.
³ Mauro Cazzaniga et al., "Gen-AI: Artificial Intelligence and the Future of Work," IMF Staff Discussion Notes 2024, no. 001 (January 2024): n., <https://doi.org/10.5089/9798400262548.006>.



Government in the crossfire

When the centre cannot hold

The state's monopoly on power is hollowing out.

\$18.3tn

in billionaire wealth is increasingly used to design the global rules of the game to its liking.⁴ The ultra-wealthy are 4,000 times more likely to hold political office than average citizens.

The 20th-century nation-state is caught in a pincer movement. From above, **a billionaire elite with USD 18.3 trillion in wealth is designing the global rules of the game to their advantage.** From below, global organised crime generates an estimated USD 5.8 to USD 10 trillion annually⁵ - roughly 5% to 7% of global GDP - creating shadow economies that often provide more liquidity and local security than struggling central governments. In this multiplex world, power is no longer defined by lines on a map.

This structural hollowing is accelerated by the fragmentation of truth. In various geographies, the weaponisation of identity and manufactured narratives prevents regions from acting as a unified whole, often following intentional instigation. **This is not merely a digital nuisance - it is a weapon of war.**

Perhaps most damaging is the internal fracture. When a government doubles down on internet shutdowns - the number of which have doubled across Africa since 2016 - it commits a slow institutional suicide. **By silencing its citizens, the state destroys the proximity it needs to survive, and hands the population over to encrypted, non-state alternatives.**

The future we want

We want a continent where national borders are reinforced by informational and economic integrity - a future where the state is not a fragmented shell but a resilient entity that protects the digital and physical square from capture by billionaires, criminals, or its own worst impulses. What that state looks like, and how it gets there from here, is the most contested question in the African political economy right now. Whether that is still possible - and for which states, on what timeline - remains to be seen.

Africa is now at an inflexion point: leverage emerging technologies and shrinking civic space to control this generation, or open up to the new ways of thinking and innovation that make them the engine of growth. That choice is being made now, mostly by default.

Old terms

Regulatory strategies built around a government that can enforce its own laws and maintain the informational environment that investors depend on. Government relations as a closed-door negotiation with a state assumed to have the authority to deliver.

That assumption is no longer safe.

New terms

The state that survives moves from control to protection, closing the shadow economy gap by delivering what criminal network usurpers currently provide, and earning legitimacy through proximity rather than force.

This is a question no one is asking but needs to be asked, plainly.

⁴ Alex Maitland et al., *Resisting the Rule of the Rich: Defending Freedom Against Billionaire Power* (Oxford: Oxfam International, 2026), n. <https://doi.org/10.21201/2025.000113>
⁵ The Millennium Project, "Global Challenge 12: Organized Crime," State of the Future, accessed March 10, 2026, <https://www.millennium-project.org/challenges-overview/global-challenge-12/>.



Civic inflexion point

The force is already in the field

The intellectual base that could enable Africa to leverage emerging technologies exists.

But it is not where the power structures are looking.

19

Africa's median age - a continent where 830 million young people are projected by 2050 - is already the dominant force in the present, developing new tools and interventions that the existing power structures have not yet learned to read.

The information landscape represents a collision between unprecedented human energy and increasingly sophisticated mechanical control. Governments are responding not through dialogue but through the systematic closing of civic space. According to Freedom House's 2025/2026⁶ analysis, global freedom has declined for 19 consecutive years, with 60 countries deteriorating in the last year alone. When proof becomes impossible, and verification is too slow, the only remaining currency is trust.

The most dangerous frontier is post-fact fatigue within a total regulatory vacuum. The *Liar's Dividend* prospers - where real evidence is dismissed as fake and fake media is embraced as truth. **2026 has been dubbed the Year of the African Cloud, as Rwanda, South Africa, and Ghana work to establish sovereign data centres to reclaim control from Western tech giants.** The same infrastructure presented as digital sovereignty is simultaneously used to map activist networks. For any organisation whose operating environment depends on a stable information landscape, this is not a governance problem. It is a business risk.

Yet this is the same generation rewriting how power is contested. From Kenya's *#RejectFinanceBill* to Morocco's *#GenZ12* to Madagascar's *Gen Z 261* - which led to the collapse of a government - these are not protests. They are high-speed, leaderless networks that utilise encrypted platforms to organise in real time. This generation is not aligned with the power structures of today, domestic or external.

This is compounded by a ticking clock: the "Harvest Now, Decrypt Later" strategy, where adversaries are already hoarding today's encrypted traffic to be exposed by future quantum computers. Today's dissent is being stored to become tomorrow's tool for persecution. For the 19-year-old activist in 2026, this means that their current "secure" communications are effectively a time bomb; every private message sent today could be retrospectively used for state persecution decades into the future. This retroactive loss of privacy creates a chilling effect that extends through time, as the fear of future exposure begins to stifle current dissent, fundamentally altering the risk calculus for political engagement.

The future we want

We are moving from an era of polling - where leaders and organisations rely on distant, delayed data to understand the people - to an era of proximity, where trust is a daily negotiation conducted in the digital square. A new social contract built for the needs of an evolving population, not imported from economies that were never designed for us.

Whether the institutions that need this generation can align with it - rather than suppress it - is the question being answered on its own terms, without waiting for permission.

Old terms

Industry operating on a B2G model - Government Relations as a closed-door negotiation with the state as the primary interlocutor. Strategy built around a government that can hold the informational environment stable.

That population is building alternatives now. The digital electorate can topple a brand, a bill, or a government in a weekend.

New terms

The shift from B2G to B2P - Business to Population. Trust is no longer a five-year event but a daily negotiation in the digital square.

Organisations earn their human license to operate through proximity and transparent service. Not through the state. Through the people.

Who shapes what comes next

Africa has been here before.

Not here exactly, but at a moment where the architecture of global power was shifting, where the old terms were losing their grip, and where the decisions taken in a short window would define the decades that followed. We know what it costs when that moment is met without sufficient ambition. We know the high cost of failing to act with sufficient ambition then, and what we forfeited.

This time, the leverage is real.

But leverage without the organisational capacity to deploy it is just potential – and potential has never been Africa’s problem. The harder conversation is about leadership: whether the people making decisions inside the continent’s institutions and its partner organisations have genuinely confronted a generation that is rewriting the rules faster than the organisations meant to govern them can read. That gap – between the leadership that built the current model and the civic force that is replacing it – is where this moment will be won or lost.

What this moment requires is not more diagnosis.

It requires unlikely coalitions between governments and the civic movements they have spent a decade trying to contain; between global capital and the African private sector it has historically underpriced; and between the institutional leadership that holds the current architecture and the generation that has already built the next one.

The shifts described here are inevitable.

The transitions they drive are already underway and are being drafted in our capitals and academic hubs – but the final script belongs to those who act.

At Africa Practice, we partner with those committed to shaping this journey – partners who are ready to invest in the operational change that turns potential into reality.

If these shifts are raising questions for you and your organisation, let’s think through them together. Reach out to Africa Practice’s Foresight team at growth@africappractice.com.

With thanks to the colleagues whose collective foresight and strategic contributions shaped our position.

Thanks

Our offices

- Abuja
- Cape Town
- Dakar
- Dar es Salaam
- Gaborone
- Johannesburg
- Lagos
- London
- Nairobi

[Connect on LinkedIn](#)

[Join our newsletter](#)



[Listen to our podcast](#)

www.africappractice.com

