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The African Mining Dossier

USASIP, the \$500M Deal, the Books, the People, and the Opinions

Compiled for K / Dusoma Foundation — August 2026

This dossier merges, unedited, the six documents produced in this project: the multi-perspective program analysis, the full reactions & criticism report, the mining-rights learning report (books, precedents, networks), the Mugenyi-register critique, the war-room strategy memo, and the complete source library.

U.S.-Africa Strategic Investment Program (\$500M) — Multi-Perspective Brief

Prepared for K / Dusoma fundraising — August 4, 2026 Opportunity: DFOP0019410, Bureau of African Affairs (AF), Office of Assistance, U.S. Department of State. Annual Program Statement issued July 23, 2026.

1. Short, unbiased history — and is it a rubber stamp?

This program did not exist a year and a half ago, and neither did the office running it. It is a direct product of the dismantling of USAID: after the January 2025 aid freeze, roughly 83% of USAID programs were cancelled, and in July 2025 the agency's remaining functions were folded into the State Department, ending six decades of an independent U.S. development agency. Africa lost about a quarter of U.S. aid directed at the continent. What replaced it is a “trade, not aid” doctrine — Secretary Rubio's line, quoted in the APS itself, is “we will prioritize trade over aid, opportunity over dependency, and investment over assistance.” The money behind this APS is a new pot called the FY2026 **National Security Investment Program (NSIP)** — repurposed foreign-assistance dollars now flowing through State's regional bureaus, legally anchored in Section 496 of the Foreign Assistance Act (the old Development Fund for Africa authority). The policy scaffolding around it includes the U.S.–AU Strategic Investment Working Group (January 2026), the DRC–Rwanda peace/minerals deals, Project Vault (a \$10B EXIM strategic-minerals financing package), and a wave of bilateral minerals MoUs (Guinea, Morocco, Rwanda, Burundi).

Is it a rubber stamp? Not in the literal sense of money pre-wired to a named recipient. The mechanics are real 2 CFR 200 grant machinery: open competition, a two-page Statement of Interest, a Merit Review Panel scoring against published weighted criteria, and standard federal risk review. Anyone can submit, and the SOI stage is deliberately cheap.

But three design features give the Department near-total discretion over who actually wins. First, eligibility and preference language (“U.S. and U.S.-aligned companies,” “alignment with U.S. supply chain goals”) is undefined and elastic. Second, the Merit Review Panel evaluates not just your project but “U.S. foreign policy goals and AF's overall priority needs” — an explicitly political criterion — and *final selection rests with a single senior official*. Third, the APS reserves the right to make ten awards, one award, or none, “pending funding availability.” So: a genuinely open front door, with a back room where strategy decides. That's not a rubber stamp; it's a curated competition. The realistic reading is that State wants a pipeline of credible implementers for a commercial-diplomacy agenda it has already set, and the KPIs give the game away — one literally measures “volume of critical minerals transiting on the Lobito Corridor.”

2. Logistics — the machinery

The ask at entry is small. A single PDF: 1-page cover table, 2-page narrative, 1-page summary budget (Times New Roman 12pt, single-spaced, 1-inch margins), emailed to **AF-A-Proposals@state.gov** with DFOP0019410 in the subject line. Notably, submission is by email — not grants.gov — which tells you the office is small and the process hands-on. No SAM.gov/UEI registration is required at the SOI stage (only for full proposals — and registration takes 4–8 weeks, so start early if serious). Up to two SOIs per organization per window. A rejected SOI may not be resubmitted in a later window.

Rolling quarterly windows:

Window	SOI due	Results notified
1 (Jul 23–Aug 21)	Aug 21, 2026	Nov 29, 2026
2 (Aug 22–Nov 30)	Nov 30, 2026	Mar 1, 2027
3 (Dec 1–Mar 1)	Mar 1, 2027	May 29, 2027
4 (Mar 2–May 31)	May 31, 2027	Aug 29, 2027

The funnel. SOIs get a technical eligibility screen, then Merit Review Panel scoring: Quality/Feasibility of the idea **40%**, Organizational Capacity and past experience **25%**, Leverage/burden-sharing/partnerships **20%**, Program planning **15%**. Tie-breaker: the applicant with the *lower indirect cost rate* wins (per EO 14332 — a deliberate squeeze on big-overhead contractors). Three outcomes: rejected (no feedback given), invited into a “consultative program design” (co-design) phase where State’s subject-matter experts reshape your concept with you — at your own expense — or invited straight to Phase 2 full application via State’s MyGrants system. Awards are grants or cooperative agreements (the latter with “substantial involvement,” i.e., State approving stages, work plans, even participant selection).

Money mechanics. \$5M–\$50M per award, 12–36 month performance, ~10 awards expected against \$500M, all funds must be obligated by September 30, 2027 — which means the real spending clock is fast, and awards will be made no later than ~October 1, 2027. Payments via HHS Payment Management System (U.S. orgs) or SF-270 reimbursement (non-U.S. orgs). Cost-sharing is not required and isn’t scored — but “leverage” of non-USG resources is 20% of your score, so it de facto matters.

The fine print that bites. No construction. No programs “primarily for the growth of the organization” and no fundraising campaigns. UNRWA is banned from any subaward. Awards where U.S. performance is involved require certification of compliance with federal anti-discrimination law *and* certification that the organization runs no DEI programs that “violate” those laws. All awards carry the PHFFA terms (2 CFR 602/603/604) — abortion-related, “gender ideology,” and “discriminatory equity ideology” award conditions that the APS itself flags as carrying compliance costs. State can terminate any award that “no longer effectuates program goals or agency priorities” (2 CFR 200.340). Branding follows brand.america.gov.

3. Who is slated to win, who this is for, how fast, and how the \$500M divides

How the pie divides. $\$500\text{M} \div \sim 10$ awards = an average award around \$50M — the ceiling — though the floor is \$5M. Expect a barbell: a handful of very large awards (\$30–50M) to institutional players who can absorb and obligate fast given the Sept 2027 deadline, plus some smaller (\$5–15M) targeted plays. Two focus areas split the field:

Critical Minerals Investment (geological mapping, minerals governance, value-addition, workforce localization, transaction advisory, Lobito Corridor throughput) and **Commercial Diplomacy Acceleration** (regulatory reform, telecom/Open RAN, U.S. AI-stack and cloud adoption, LNG/energy, customs modernization, IP protection, dollar-based digital payments).

Who it's for — read the KPIs, not the press release. Every indicator measures either deals closed for U.S./U.S.-aligned companies, minerals moving, officials trained, or barriers to U.S. entry removed. The natural winners are: transaction-advisory and investment-facilitation firms; the big development contractors (the Chemonics/DAI/Palladium tier) reinventing themselves as commercial-diplomacy shops — though the low-indirect-rate tie-breaker is aimed squarely at trimming their overhead; business councils and chambers (Corporate Council on Africa type); geological survey and mining-governance specialists; energy and telecom consultancies; and public international organizations. U.S. companies themselves are eligible *as applicants* — a striking feature: for-profits can take grant money to develop the enabling environment they then invest in.

The adjacent commercial ecosystem (not grant applicants, but the intended beneficiaries of the “enabling environment” this money buys) is well documented: KoBold Metals (Manono lithium, \$1B), Ivanhoe Mines, Rio Tinto, Glencore, Alphamin, Orion Resource Partners, and politically wired newcomers like America First Global (chaired by Trump campaign finance figure Gentry Beach, negotiating Rubaya coltan) and Erik Prince’s mineral-security contract with the DRC. The Oakland Institute’s “Profit off Peace” report maps these ties in detail. That is the gravity field this grant program orbits in.

How fast. Window 1 closes August 21 — 17 days from today — with results Nov 29. Realistically, SOI to signed award is 6–12 months (the APS itself warns “several months”). First program starts no later than October 1, 2027. For federal money, this is fast; the obligation deadline forces it.

4. The criticism report — who's upset, who's excited, and what's the catch

Excited: The commercial-diplomacy world. The Foundation for Defense of Democracies framed it as “The State Department’s \$500 Million Bet To Beat China on African Minerals” — the hawkish think-tank set sees this as overdue industrial statecraft. Grant aggregators (fundsforNGOs, DevelopmentAid, federalgrants.com, bid shops like Bid Banana and GTC 360°) are actively promoting it, and African business media (StatiSense, Diplomatic Insight, African Business) are covering it as opportunity — StatiSense’s viral framing was “up to 100 businesses expected to benefit.” Some African governments are leaning in: DRC’s government publicly praises the U.S. partnership, and Guinea, Morocco, Rwanda, and Burundi have signed minerals MoUs. Even one U.S. lobby (the U.S.-Cuba Trade and

Economic Council) admirably called the APS an “off-the-shelf solution” other regions should copy.

Upset — four distinct camps:

The development/humanitarian community sees NSIP money as repurposed aid: health, education, and humanitarian programming (PEPFAR continuity, Sudan community kitchens) was cut to fund deal-making. ORF’s analysis warns the model “risks reproducing existing asymmetries under the guise of partnership” and will bypass fragile states and social sectors. Devex reporting documents a State Department struggling to rebuild an aid workforce and “get money out the door.”

Congolese and African civil society. Jean-Claude Mputu of “Le Congo n’est pas à vendre”: “This is a race for minerals at any cost... human rights, justice and environmental protection are the biggest blind spots in these agreements.” DRC lawyers filed a constitutional challenge in January 2026 arguing the U.S. minerals deal bypassed parliament. Al Jazeera’s field reporting from mining communities is titled, simply, “We are exploited.” South Africa’s Alternative Information and Development Centre calls the broader trade posture “economic warfare.”

Accountability researchers. The Oakland Institute documents the overlap between deal beneficiaries and Trump’s political network (Gentry Beach, Erik Prince, Ballard Partners’ \$100K/month DRC lobbying contract, inauguration donors behind KoBold) and notes recipients’ records: Glencore’s \$1.1B bribery guilty plea, Ivanhoe evictions, Rio Tinto’s destruction of a sacred site. Their conclusion: taxpayer money de-risking private extraction for “a network of billionaire oligarchs.” CSIS, more soberly, warns the DRC-Rwanda minerals-for-peace framework ignores root causes and may not hold.

Some in Congress. Rep. Cherfilus-McCormick and colleagues have pressed for human-rights guarantees in the DRC process; Senate Foreign Relations testimony (July 2025) questioned the minerals-first approach.

So is this “typical Trump with a catch”? Are they Trumpers and extractors, or allies and partners?

Honest answer: the grant program itself is not a slush fund — it’s professionally drafted, competitive, standard-compliant. The “catch” is structural, not hidden, and it’s threefold. (1) *Purpose*: your project must serve U.S. supply-chain and commercial goals — that’s not a side condition, it’s the scoring rubric. The program funds the enabling environment; the profits accrue downstream, and the documented downstream includes both blue-chip miners and politically connected operators. (2) *Ideological terms*: the anti-DEI certification and PHFFA award conditions import culture-war compliance into your organization’s operations, and the 200.340 termination clause means an award can be killed if priorities shift. (3) *Contingency*: “pending funding availability,” no feedback to losers, co-design at your expense, renewal purely discretionary. The fairest characterization: it’s both. The framework is real and some funded work (minerals governance, geological data, workforce localization, customs modernization) is work African governments actually want. And it is simultaneously the assistance arm of an extraction-first strategy whose beneficiary list includes people with direct ties to the administration.

5. What your African-experts kitchen cabinet would tell you behind closed doors

(Grounded in your project docs — Dusoma Foundation/Ltd/Marla AI, East & West Africa, multi-marginalized communities, ethical data, the Masakhane partnership, and your note that you support not-for-profit mining, minimum wage, human rights and justice. I didn't have the ChatGPT brief itself — paste it in and I'll sharpen this section.)

First, they'd tell you to be clear-eyed about what this money is: **this is industrial policy, not development funding**. The word "poverty" does not appear in the APS. Health, education, and rights are not focus areas. If Dusoma applies as a development organization, it will score poorly on the 40% "quality/feasibility" criterion because the reviewers aren't buying development.

Second — and this is the interesting part — **your not-for-profit mining and labor-justice agenda sits directly on top of their stated priority challenges**. "Workforce localization and skills development." "Responsible mineral development, resource governance, and project oversight." "Increase in African government revenues from transparent and competitive minerals projects." "Local value-addition capabilities." A rights-respecting organization can write a fully compliant SOI — training mine-adjacent communities and officials in governance, building transparent minerals data, workforce development with living-wage standards baked in — that serves your mission *through* their language. The APS never says "human rights," but "transparent, competitive, rules-based" is the administration's own vocabulary for the same terrain. Your experts would call this the Trojan-horse-in-plain-sight option, and they'd note the deep irony that an anti-corruption, community-benefit minerals agenda is *more* fundable under this program than a health program.

Third, they'd warn about **absorptive capacity and the prime trap**. The floor is \$5 million over 1–3 years. An organization whose current frontier is a \$250K AWS credits application should not prime a \$5M+ federal award — the compliance load (2 CFR 200 audits, HHS PMS drawdowns, trafficking compliance plans, FADR reporting) would crush the organization, and "Organizational Capacity/past experience" is 25% of the score with no track record to point to. **The right-sized play is subrecipient**. Primes assembling consortia right now need exactly what Dusoma has: on-the-ground presence, community legitimacy, data capability (Marla AI), and an African researcher network (Masakhane). Subrecipients are named in SOIs and scored ("proposed subrecipient organizations have strong relevant expertise"). Getting onto two or three primes' bid rosters costs you a capability one-pager and ten emails.

Fourth, the **values audit**. The PHFFA gender-ideology and anti-DEI award terms are real conditions. An organization whose public identity centers multi-marginalized communities needs to decide, before applying, whether it can sign those certifications without either compromising programming or misrepresenting itself — and what it costs with your own community and other funders (including corporate ones like AWS) to carry State Department branding from this administration's flagship Africa program. Some of your experts would say take the money and do the work; at least one would resign over it. Have that conversation internally *before* the SOI, not after an award.

Fifth, **country risk cuts both ways**. Being a USG-funded implementer in a mining region can open ministry doors — and can mark you locally as an instrument of the country your communities associate with tariffs and extraction. The Al Jazeera and Mongabay reporting shows how hot that sentiment runs in the DRC. Pick geography where the U.S. relationship is currently constructive (Zambia, Angola/Lobito, Tanzania, Ghana) rather than contested.

6. Do the insiders already know? Should you broadcast this?

Both. The people this was designed for — the contractors, advisory firms, and business councils — knew before July 23; offices like this pre-socialize their agenda, and the bid-shop ecosystem (Bid Banana, GTC 360°, DevelopmentAid) indexed it within days. The Window 1 deadline (Aug 21, announced Jul 23 — a 29-day window in August) effectively belongs to organizations that were ready. **But the two-page email SOI, no-SAM-registration entry, explicit eligibility for non-U.S. organizations, and four rolling windows are a genuinely low front door**, and U.S. embassies (Malawi, Cameroon, others) are actively republishing the notice — the Department visibly wants African and non-traditional applicants in the SOI pool, at minimum to populate its co-design pipeline.

So yes — this is a good one to make sure your network knows about, with honest framing: minimum \$5M, must serve U.S. commercial/supply-chain goals, ideological award terms, and for most grassroots organizations the realistic entry is *partner/subrecipient to a prime, or a consortium SOI*, not a solo application. Practical sequence for anyone in your orbit: (1) email a notice of intent + questions to AF-A-Proposals@state.gov before the next Q&A deadline (Window 2 questions due Sept 11; answers posted on grants.gov are free intelligence about what State actually wants); (2) start SAM.gov registration now (4–8 weeks); (3) skip Window 1, build a consortium, and target Window 2 (Nov 30) or Window 3 (Mar 1); (4) remember a rejected SOI can never be resubmitted — don't burn a concept on a rushed draft.

Full link library in the companion document: [usasip-sources.md](#) (also saved to the project).

Who's Excited, Who's Upset, and Where the Catch Is

A Full Report on Reactions to the U.S.-Africa Strategic Investment Program (\$500M, DFOP0019410)

Prepared for K — August 4, 2026 Method note: Built from the official Annual Program Statement (read in full), U.S. appropriations records, and ~60 press, think-tank, governmental, and civil-society sources gathered August 4, 2026 (all listed in the bibliography, Section 9). Claims from sources that could not be fetched in full are flagged. This document is designed to be comparable against equivalent reports from other AI systems — every substantive claim is traceable to a listed source.

1. Executive Summary

The U.S.-Africa Strategic Investment Program is a \$500 million grant competition announced July 23, 2026 by the State Department's Bureau of African Affairs — the largest single Africa-focused funding vehicle to emerge from the post-USAID foreign assistance system. Reaction to it splits along a fault line that has less to do with the program's mechanics (which are conventional and professionally drafted) than with what it represents: the formal conversion of American development aid into an instrument of commercial and minerals strategy.

The excited camp — China hawks, the grants-and-bids industry, U.S. commercial diplomacy advocates, and a set of African governments actively signing minerals deals — sees overdue realism and real money. The upset camp — the development and humanitarian community, Congolese and broader African civil society, accountability researchers, and some members of Congress — sees repurposed aid money underwriting extraction, with human rights and social sectors designed out. Between them sits a sober middle (CSIS, ORF, African economists) that accepts the investment logic but doubts the execution and warns about what gets left behind.

The “catch” the program's critics point to is not concealed. It is written into the document: projects must serve U.S. supply-chain and commercial goals; awards carry the administration's ideological certifications; and the Department retains sweeping discretion at every stage, including the right to terminate awards that “no longer effectuate... agency priorities.”

2. What Is Being Reacted To — A One-Page Primer

The program offers roughly ten awards of \$5–50 million each (grants or cooperative agreements, 12–36 months) across two focus areas: **Critical Minerals Investment** (minerals governance, geological data, value-addition, workforce localization, transaction advisory) and **Commercial Diplomacy Acceleration** (regulatory reform, telecom/Open RAN, U.S. AI-and-cloud adoption, LNG and energy, customs modernization, dollar-based

digital payments). Entry is a two-page emailed Statement of Interest, reviewed in rolling quarterly windows; selected concepts proceed to a co-design phase or a full application. Eligibility spans U.S. and “U.S.-aligned” for-profits, nonprofits, and public international organizations. Preference goes to projects that “de-risk and catalyze investment from high-quality U.S. and U.S.-aligned companies,” and recipients “must demonstrate alignment with or a commitment to advancing U.S. supply chain goals.” One key performance indicator is the “volume of critical minerals transiting on the Lobito Corridor.” All \$500 million must be obligated by September 30, 2027.

3. The Money Trail — Why the Development Community Calls It “Repurposed Aid”

The funding line matters to nearly every criticism, so it deserves precision. The APS states the money comes from the **FY2026 National Security Investment Program (NSIP)**. NSIP is a new appropriations account, funded at **\$6.77 billion in FY2026**, that consolidated three long-standing aid accounts: **Development Assistance, the Economic Support Fund, and Assistance for Europe, Eurasia, and Central Asia** (per the Congressional Research Service). In other words, the pot behind this program is the direct successor to the accounts that once funded traditional development programming — the same programming decimated when roughly 83% of USAID awards were terminated in 2025 and the agency’s remnants were absorbed into the State Department that July (ORF). The Africa program’s \$500 million represents about 7% of the entire global NSIP account, concentrated on minerals and commercial diplomacy.

This is the factual basis of the development community’s core complaint: the money is not “new” money for Africa. It is what remains of development assistance, re-aimed. The U.S. Global Leadership Coalition has documented broad bipartisan unease with the scale of assistance cuts; InterAction’s FY2027 “Choose to Invest” analysis tracks what the consolidated accounts no longer fund. Devex reporting adds a capacity concern: the State Department is “scrambling” to rebuild a foreign-aid workforce and, in its own reporting’s words, finds that “getting money out the door is getting to be a real pain” — a warning sign for a program that must move half a billion dollars in fourteen months.

4. The Excited Camp

The China-competition establishment. The Foundation for Defense of Democracies greeted the APS with the headline “The State Department’s \$500 Million Bet To Beat China on African Minerals” (July 29, 2026) — framing it as a serious, overdue instrument for contesting Chinese dominance in African mineral supply chains. This is the program’s intended constituency in Washington: the analysts and members of Congress (e.g., Sen. Barrasso’s long-running focus on countering China in African mining) who have argued for years that the U.S. ceded the continent’s resources to Beijing while writing aid checks. For this camp, the KPIs the critics find damning — deals closed, minerals moving on Lobito — are precisely the point. Related evidence of momentum they cite: the \$753 million Lobito Corridor rail financing close, Project Vault’s \$10 billion EXIM strategic-minerals package, and a run of bilateral minerals agreements.

The grants-and-bids industry. Within days of publication, the opportunity was indexed and promoted across the fundraising ecosystem: fundsforNGOs, DevelopmentAid, federalgrants.com, GTC 360° Advisors, and Bid Banana all list it, and proposal shops are selling support services. Their enthusiasm is commercial, but it is also a market signal: professional bid-watchers rate this as real, winnable money.

African business media and commentators. StatiSense’s widely shared summary framed the program as “up to 100 businesses across minerals, consumer services, and products sectors... expected to benefit.” African Business and The Diplomatic Insight covered the broader minerals push as opportunity. The tone in this coverage is notably pragmatic — less about American motives, more about how African firms can position.

A set of African governments. The clearest expressions of enthusiasm come from capitals actively signing: the DRC government has publicly praised the U.S. partnership as the minerals race intensifies (Rio Times); Guinea signed a bauxite/iron MoU in February 2026; Morocco signed at the same summit; Rwanda signed a partnership agreement in December 2025; Burundi concluded two mining cooperation agreements in March 2026 (Financial Afrik, Mongabay). For these governments, U.S. engagement is leverage — against Chinese pricing power, and for infrastructure they want built. The conditional-optimist position was captured by Kenyan commentator Koko Buroko Gloire (Al Jazeera): the deals are worthwhile *if* they deliver “roads,” “clean water,” and “hospitals.”

An admiring outside observer. The U.S.-Cuba Trade and Economic Council published a piece asking whether the APS is an “off-the-shelf solution” that should be copied for other regions — evidence the program is being read, even outside Africa policy, as a template for the administration’s new assistance model.

5. The Upset Camp

5a. The development and humanitarian community

The objection here is arithmetic before it is ideological. The NSIP account that funds this program is the consolidated remainder of the development-assistance system; what it now buys in Africa is minerals governance and commercial facilitation, not health, education, or humanitarian response. ORF’s widely republished analysis (also run by Ethiopia’s Capital newspaper) catalogs the transition’s human costs — disrupted HIV/AIDS treatment continuity, roughly 1,100 community kitchens closed in Sudan affecting some two million people — and warns the investment-led model “risks reproducing existing asymmetries under the guise of partnership,” bypassing fragile states and social sectors because “investment decisions may reflect US strategic and industrial needs as much as African development priorities.” The APS reinforces the fear textually: the words *poverty*, *health* (outside “healthcare innovation” as a U.S. export sector), and *human rights* do not appear as objectives.

5b. Congolese and African civil society

This is where the criticism is most concrete, most quotable, and most grounded in lived experience:

Jean-Claude Mputu, spokesperson for the Congolese coalition “**Le Congo n’est pas à vendre**” (“Congo is not for sale”), on the U.S. minerals framework: *“This is a race for minerals at any cost... human rights, justice and environmental protection are the biggest blind spots in these agreements”* — negotiated, he adds, “in total opacity” without parliamentary involvement (Mongabay). In **January 2026, DRC lawyers and human rights defenders filed a constitutional court challenge** alleging the U.S. minerals agreement bypassed required parliamentary approval or referendum.

Al Jazeera’s reporting from Goma and Tanganyika gathered the street-level version. Economics student Gerard Buunda: *“We are exploited in mineral extraction”* — foreign multinationals bring “poverty and low wages, child exploitation, and environmental degradation,” with investors working “in collusion with our leaders.” Transparency activist Gentil Mulume warns the deals risk “continuing structurally unbalanced partnerships in which the DRC remains a mere supplier.” Environmental activist John Katikomo calls the arrangements “opaque”: *“Will the population benefit from this?”* Goma resident Daniel Mukamba invokes the resource curse — a “cancer” — noting that mineral-rich Walikale and Rubaya remain impoverished.

In South Africa, the Alternative Information and Development Centre characterizes the broader trade posture as “**economic warfare**” rather than partnership (PBS NewsHour) — a reaction inseparable from the tariff shock: South African vehicle exports to the U.S. down over 80%, 100,000+ jobs at risk, and Lesotho’s textile sector hit with 50% duties. Economist Brendon Verster’s warning distills the continental anxiety: the U.S. *“risks leaving Africa behind once [it has] gotten what it wanted, which will probably be critical minerals.”*

5c. Accountability researchers — the “Trumpers and extractors” file

The Oakland Institute’s report “**Profit off Peace?**” is the most systematic attempt to map who actually benefits from the U.S. minerals push in the DRC, and it supplies the strongest version of the crony-capitalism critique. Among the ten corporate beneficiaries it identifies: **KoBold Metals** (\$1 billion Manono lithium rights; backers include several \$1–2.5M Trump-inauguration donors), **America First Global** (negotiating Rubaya coltan rights; chaired by Gentry Beach, Trump 2016 campaign finance co-chair and college friend of Donald Trump Jr.), **Erik Prince** (Blackwater founder; April 2025 agreement to help the DRC enforce mineral taxation), **Ballard Partners** (Brian Ballard, Trump super-donor; \$100,000/month DRC lobbying contract), plus majors with documented records — **Glencore** (guilty plea, \$1.1 billion in bribery penalties, 2022), **Ivanhoe Mines** (2017 forced evictions), **Rio Tinto** (destruction of the 46,000-year-old Juukan Gorge site). The report’s conclusion: taxpayer-funded de-risking for “a network of billionaire oligarchs,” in a deal structure offering no mechanism for local communities to benefit. The administration’s Africa file, it notes, runs through senior adviser **Massad Boulos** — father-in-law of Tiffany Trump.

The honest caveat, which the report itself supports: these are beneficiaries of the *deals ecosystem* around U.S. minerals policy, not (so far) applicants to this grant program. The grant program funds the enabling environment; the network above operates downstream of it. That distinction matters analytically — and is also precisely why critics find the

arrangement elegant: the grant money never has to touch the connected companies to serve them.

5d. The sober middle — think-tank skeptics

CSIS (Mvemba Phezo Dizolele): the minerals-for-peace framework treats minerals as the disease when they are a symptom; the real drivers are “regional power struggles, historical grievances, poor governance, land and citizenship disputes.” Without transitional justice, inclusive dialogue, and EITI-grade transparency, Washington’s role as “broker of resource access” is insufficient and the peace will not hold. **ORF** grants the investment logic but flags the securitized lens of the 2025 National Security Strategy and an FDI reality check: African FDI fell 38% to \$59 billion in 2025 — the private capital this strategy assumes will follow the grants has so far been retreating, making the model “a high-stakes gamble.”

5e. Congress

Criticism from Congress has focused on the DRC-Rwanda process more than the APS itself: Rep. Sheila Cherfilus-McCormick’s statement and a House members’ letter (Olszewski et al.) pressed for human-rights guarantees and civilian protection in the peace-and-minerals framework; July 2025 Senate Foreign Relations testimony (Pratt, Woodard) questioned the minerals-first approach. On the money side, House and Senate Democrats’ appropriations summaries and USGLC document bipartisan discomfort with the scale of the assistance consolidation, and the administration has already proposed replacing NSIP itself with an “America First Opportunity Fund” in FY2027 (CRS) — a reminder that the account funding this program is politically unstable ground.

6. So Is This “Typical Trump, and There’s a Catch”?

Three findings, stated as plainly as the evidence allows.

First: the grant program itself is not a slush fund. It is standard 2 CFR 200 machinery — open SOI competition, published scoring weights, merit panels with conflict-of-interest agreements, federal risk review, an anti-overhead tie-breaker. Nothing in the document pre-wires a named winner, and the two-page email entry is unusually accessible.

Second: the catch is real, but it is printed on the label. Four design features do the work critics object to. (1) *Purpose lock*: supply-chain alignment is an eligibility requirement and U.S.-investment catalysis is the scoring preference — mission-driven applicants must serve the commercial objective or lose. (2) *Ideological award terms*: the anti-DEI certification and the PHFFA conditions (2 CFR 602/603/604 — abortion-related, “gender ideology,” and “discriminatory equity ideology” award terms) import the administration’s domestic culture-war framework into every award, with acknowledged compliance costs. (3) *Discretion everywhere*: “U.S.-aligned” is undefined; the merit panel scores “U.S. foreign policy goals and AF’s overall priority needs”; final selection rests with a single senior official; the Department may fund ten, one, or zero applications “pending funding availability.” (4) *The trapdoor*: 2 CFR 200.340 termination authority if an award “no longer effectuates... agency priorities,” in an account Congress may abolish next year. None of this is hidden; all of it transfers risk and control to the government.

Third: “Trumpers and extractors” and “allies and partners” are both accurate, describing different layers. The *policy layer* (this APS, Lobito, geological data, customs modernization, workforce localization) funds work many African governments demonstrably want, and its transparency-and-governance vocabulary is genuine grant-speak that reform-minded implementers can use in good faith. The *deals layer* around it demonstrably includes politically connected operators and extractive majors with grim records. The program’s design connects the layers by intention — public money makes the environment safe for the private money — which is why the same \$500 million reads as statecraft from one angle and as subsidized extraction from the other. Both readings are looking at the same machine.

7. Reaction Scorecard

Constituency	Position	Signal source
FDD / China hawks	Strongly favorable — “bet to beat China”	FDD analysis, Jul 29, 2026
Grants/bids industry	Favorable (commercial)	fundsforNGOs, Bid Banana, GTC 360°, DevelopmentAid
African business media	Pragmatically favorable	StatiSense, African Business
DRC, Guinea, Rwanda, Burundi, Morocco govts	Engaged/favorable — signing agreements	Mongabay, Financial Afrik, Rio Times
U.S. development/humanitarian community	Opposed to the reallocation	ORF, Devex, USGLC, InterAction
Congolese civil society	Strongly critical — rights blind spots, opacity, constitutional challenge	Mongabay, Al Jazeera
South African civil society/economists	Critical — “economic warfare,” extraction fears	PBS NewsHour
Oakland Institute / accountability researchers	Strongly critical — crony beneficiary network	“Profit off Peace?”
CSIS / ORF analysts	Skeptical middle — logic granted, execution doubted	CSIS, ORF
Congressional Democrats	Critical on rights and aid cuts	Cherfilus-McCormick, House letter, approps summaries
Kenyan/regional conditional optimists	“Worth it if roads, water, hospitals arrive”	Al Jazeera

8. Bottom Line for a Mission-Driven Applicant

Every camp's read is useful to you differently. The hawks tell you the money is real and politically protected this fiscal year. The bids industry tells you competition is forming fast. The critics tell you exactly which reputational questions your board, your communities, and your other funders will ask — and the civil-society quotes in Section 5b are the voices your own staff will echo. The sober middle tells you where the durable, defensible work is: transparency, governance, workforce, community benefit — the corners of this program where taking the money and keeping your values point the same direction.

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Getting Human Rights Into Mining Agreements

A Learning Report: What Works, Who Won, Why Most Agreements Fail, and What Dusoma + UPAN Can Do

Prepared for K — August 4, 2026 Companion to: the USASIP \$500M reports in this project. Method: web research August 4, 2026 (~40 sources, bibliography in Section 11) plus established literature. Where a claim rests on memory rather than a fetched source, it's hedged and flagged for verification.

1. Start Here — The Reading List

Books (recent, narrative, readable):

Cobalt Red: How the Blood of the Congo Powers Our Lives — Siddharth Kara (2023). The book that put DRC cobalt on the mainstream agenda. Ground-level reporting from artisanal mining zones; its core claim — that corporate supply-chain “clean cobalt” assurances are largely fiction — is the single most useful inoculation against paper guarantees. Read first.

The War Below: Lithium, Copper, and the Global Battle to Power Our Lives — Ernest Scheyder (2024). A Reuters correspondent on the fights over new mines (Thacker Pass, Oak Flat, Chile) — the best current book on how communities, companies, and governments actually collide over a proposed mine. (See the Foreign Affairs review pairing it with related titles.)

Power Metal: The Race for the Resources That Will Shape the Future — Vince Beiser (2024). Shorter, global, sharp on the “green extraction” contradiction.

Volt Rush: The Winners and Losers in the Race to Go Green — Henry Sanderson (2022). A Financial Times reporter on the battery supply chain; strong on Glencore, China, and the DRC.

Material World — Ed Conway (2023). The wide-lens primer on the six materials that run civilization; useful for the economics.

For the deep history of why “the minerals leave and the misery stays,” pair any of the above with Adam Hochschild’s *King Leopold’s Ghost*.

Free, in-depth, and directly practical (this is the actual toolbox):

The Columbia Center on Sustainable Investment’s free library is the closest thing to a professional curriculum on your exact question: their [Emerging Practices in Community Development Agreements](#) paper (Loutit et al., free PDF), the [Community Benefits](#) theme page, and the [community development laws + CDA database](#). Read alongside the [SDSG CDA Library](#), which archives actual signed community development agreements — reading real contracts is the fastest way to learn what strong vs. weak looks like. IIED maintains a [collection of community development laws for the mining sector](#) and a [mapping of](#)

[community development requirements country by country](#) — including a piece squarely on East Africa: “[Mining and Community Development Agreements: a panacea for community justice in Uganda?](#)”. Add: the World Bank’s *Mining Community Development Agreements Sourcebook* (free, 2012 — still the standard reference); the OECD Due Diligence Guidance for Responsible Mineral Supply Chains (mneguidelines.oecd.org); the UN Guiding Principles on Business and Human Rights; the Danish Institute for Human Rights’ free Human Rights Impact Assessment Guidance and Toolbox (humanrights.dk); the IRMA Standard for Responsible Mining (responsiblemining.net) — the only mining standard where communities and labor hold equal governance seats with industry; and the Natural Resource Governance Institute’s Natural Resource Charter (resourcegovernance.org). For current casework, the Business & Human Rights Resource Centre’s [Transition Minerals work](#) and [Amnesty’s critical minerals campaign explainer \(June 2026\)](#); for the sharpest recent research, the Nottingham Rights Lab’s “[Blood Batteries](#)” report (2025, free PDF).

Academic anchor if you want one book-length treatment of negotiated agreements: Ciaran O’Faircheallaigh, *Negotiations in the Indigenous World* — the definitive comparative study of what makes Indigenous benefit agreements strong or weak.

2. The Mechanisms — How Rights Actually Get Into Agreements

Six instruments recur across every success story, in roughly ascending order of strength. **Consultation requirements** (weakest — a meeting is not consent). **Free, Prior and Informed Consent (FPIC)** under UNDRIP and ILO 169 — consent, including the right to say no; the strongest procedural right, and the most gamed. **Community Development Agreements (CDAs)** — legally binding contracts between company and community, now *mandated by law* in a growing list of African countries (Nigeria, Sierra Leone, Guinea, Kenya, Mozambique; Uganda’s Mining and Minerals Act 2022 came close — see IIED on whether it delivers). **Legislated revenue shares** — e.g., Sierra Leone’s ~1% Community Development Fund, DRC’s 0.3% *dotation communautaire*. **Impact and Benefit Agreements (IBAs)** — the Canadian/Alaskan model: negotiated packages of royalties, employment quotas, contracting preferences, and environmental co-management, backed by Indigenous land rights. **Equity and ownership** — the community or its institution owns part of the mine or the land under it. The pattern to internalize: *the strength of what communities get tracks the strength of what they legally hold before negotiation begins*. Consultation rights get you meetings; land title gets you royalties.

3. Who Has Actually Succeeded

Red Dog, Alaska — the ownership model, and the single best answer to your “shouldn’t most of the money go to the people” question. The world’s largest zinc mine sits on land owned outright by [NANA Regional Corporation](#), an Iñupiat-owned corporation created by the Alaska Native Claims Settlement Act. Because NANA *owns the resource*, its 1982 agreement with Teck runs on a royalty that began at 4.5% of net smelter return and, after capital payback, steps up every five years toward a large share of net proceeds ([ICMM case study](#), [US SIF case study](#)) — well over a billion dollars to date, with a majority of jobs held by NANA shareholders, and (under ANCSA’s section 7(i)) a large share of resource revenue redistributed to *other* Alaska Native corporations, an inter-community solidarity

mechanism with no real African analogue yet. It is not uncomplicated — see [ICT's reporting on what happens when the ore runs out](#) and the [Alaska Beacon on the mine's wind-down](#) — but it is the existence proof: when the community holds title, “most of the money” stops being a slogan and becomes a contract term.

Canadian IBAs — Raglan (1995) and Voisey's Bay: profit-sharing, hiring floors, community veto points; imperfect but real, and built on the same foundation (recognized Indigenous land rights + confidential but binding contracts).

Botswana — the state-equity route: Debswana (50/50 government-De Beers) funded much of the country's development; the “most of the money” answer at national rather than community scale, with well-known limits (it works when the state is competent and accountable).

And the refusals — activism's wins, which are mostly wins of stopping: [Panama, 2023](#): the largest protests in the country's modern history shut down First Quantum's Cobre Panamá — ~5% of GDP — and the Supreme Court voided the contract as unconstitutional ([BBC](#), [NACLA's analysis of why the movement won](#), [Waging Nonviolence on the ongoing fight to keep it closed](#)). El Salvador, 2017: a decade of community organizing (and three murdered activists) produced the world's first national metals-mining ban — and a landmark ISDS defense win against Pacific Rim/OceanaGold — before a Bukele-aligned legislature reversed the ban in December 2024 (verify current status; the reversal is the cautionary coda: *legislative wins are rentals, not purchases*). Bougainville, PNG: the Panguna uprising (1988) closed one of the world's largest copper mines permanently and ultimately produced an independence referendum — the maximal case that communities can impose costs no army protects against. Serbia's Jadar lithium license was revoked in 2022 after mass protests (later revived — same lesson as El Salvador). Greenland banned uranium mining in 2021, stopping Kvanefjeld. Ecuador's Cuenca referendum (2021) banned mining in its watersheds by ~80%. And the transparency movement — Publish What You Pay (2002) → EITI (2003) → Dodd-Frank 1502 conflict-minerals rules → the OECD guidance — is activism's *systemic* win: it didn't stop a single mine, but it made hiding the money harder everywhere.

The honest scorecard experts would give: activism has been excellent at **stopping mines** and **forcing disclosure**, decent at **raising national revenue shares**, and weak at **converting operating mines into community prosperity** — because that last one requires the ownership/equity mechanisms that almost no legal system grants African communities.

4. “Shouldn't MOST of the money go to the people who live around the mine?” — The Honest Economics

Here is the uncomfortable arithmetic every expert carries. Of a mine's revenue, roughly 40–70% goes to operating and capital costs and debt; of what remains, the *national* government typically captures 30–60% via royalties and taxes (when transfer pricing doesn't hollow it out — see Section 8). The *legally mandated community share*, where one exists at all, is typically **0.25%–1% of revenue** — DRC's 0.3%, Sierra Leone's ~1%. So

under the standard model, the people who bear the dust, the displacement, and the water risk receive well under a cent of each dollar, plus whatever jobs and clinics a CDA extracts. “Most of the money” is not what any existing African framework delivers — it is what *ownership* delivers (Red Dog), what *state equity plus good government* partially delivers (Botswana), and what the Africa Mining Vision (the AU’s own policy framework) gestures toward but no member state has implemented at community level. This is exactly the argument now playing out around **data centers** in the U.S., as you say — communities discovering that hosting the infrastructure while receiving tax abatements and water bills is a bad trade, and starting to demand community benefit agreements with revenue shares. The mining movement is thirty years ahead of the data-center movement on this learning curve, which is precisely why the reading in Section 1 transfers.

The defensible maximalist position, which WoMin and the post-extractivist school argue outright: if consent is real, some communities will rationally choose *no mine*; where they choose yes, the default should invert — the burden should be on the company to show why the community share should be *less* than a controlling interest, not on the community to justify asking above 0.3%.

5. What the Guarantees Are — Enforceable vs. Decorative

Learn to sort every clause into three bins. **Enforceable:** a legislated percentage paid into an audited, community-governed fund; royalty escalators tied to production (Red Dog); employment and procurement *quotas* with penalties; independent third-party audit rights (IRMA-style, with published scores); binding arbitration the *community* can invoke; completion bonds and escrowed rehabilitation funds; contract transparency (published agreements — see resourcecontracts.org). **Semi-enforceable:** CDAs (binding, but communities rarely have lawyers to enforce them — this is where legal-empowerment groups matter); FPIC protocols (strong where courts back them, decorative where they don’t). **Decorative:** CSR spending pledges, “stakeholder engagement” commitments, unaudited ESG reports, grievance mechanisms designed by the company, MOUs “to explore benefit sharing,” and nearly everything announced at a summit. The one-line test experts use: *who can sue, over what number, in which forum, and who pays their lawyer?* If the agreement has no answer, it’s decorative.

6. How to Measure Quality of Life — So Guarantees Mean Something

The measurement toolkit is mature; the failure is that baselines are rarely taken *before* the mine arrives, which lets companies claim credit and dodge blame forever after. The core instrument is the **Multidimensional Poverty Index** method ([OPHI’s Alkire-Foster method](#), [World Bank’s Multidimensional Poverty Measure](#), [Our World in Data’s explainer](#)) — health, education, living standards measured per household, decomposable to a mining district. Around it: a pre-agreement *baseline household survey* written into the CDA itself, with repeat waves every 2–3 years by an independent party the community helps choose; **locally informed wellbeing indices** — there is a directly relevant DRC precedent, the [Ituri forest locally-informed multidimensional wellbeing index](#), where communities defined the dimensions themselves; the new [Mining Area Sustainability Index \(MASI\) proposal](#); participatory environmental monitoring (community water-quality testing with published

results — proven in Peru); and IRMA audit scores as the operational-standards layer. For Dusoma specifically: this is a place where Marla AI and your research practice give you a real edge — an independent, community-owned baseline-and-monitoring capability is scarce, fundable, and exactly what makes guarantees auditable. (It is also squarely inside USASIP’s “responsible minerals governance” language, per the earlier reports in this project.)

7. The Cynical Section — What Agreements Look Like When Experts Autopsy Them

You asked for the most cynical outputs. This is what the people who audit these systems actually find.

South Africa’s Social and Labour Plans — the flagship failure. SLPs are *legally required* development plans mining companies must deliver to keep their licenses — on paper, among the world’s strongest community-benefit regimes. The Centre for Applied Legal Studies at Wits audited them: “[Unearthing the Truth: How the Mines Failed Communities](#)” ([free PDF](#)) — commitments unfulfilled, communities never consulted on the plans made in their name, no license ever meaningfully revoked for non-compliance. Community movements MACUA and WAMUA published their own audit finding [systematic non-compliance by prominent companies despite public delivery claims](#) ([see also](#)), and mining-affected communities [accuse the regulator itself of silencing them](#). Lesson: *a legal mandate without community enforcement power is a press release.*

DRC’s 0.3% community fund — the captured-fund failure. The 2018 mining code’s *dotation communautaire* was the model reform. A [government audit found widespread mismanagement of the 0.3% funds](#); the academic literature ([political economy analysis of the 0.3% fund](#)) finds the money routed through committees that elites capture before it reaches villages. Lesson: *the percentage is not the fight; the governance of the fund is the fight.*

Audit theater. Kara’s core finding in *Cobalt Red*: supply-chain certifications functioned as fiction — auditors visit staged sites, “model mine” programs launder the rest. RAID ([raid-uk.org](#)) found the same pattern in *industrial* cobalt mines: the abuse isn’t only artisanal, and ESG audits missed it. The [Rights Lab’s “Blood Batteries”](#) extends the evidence. Lesson: *an audit whose auditor is chosen and paid by the audited is marketing.*

FPIC as box-ticking. The standard corporate move: hold consultations after the investment decision, with per-diem attendees, translated documents arriving late or never, and “consent” recorded as sign-in sheets. Oxfam’s Community Consent Index documents the gap between FPIC policies and practice across major miners.

The ISDS trapdoor. When states do act, investor-state arbitration punishes them: El Salvador spent ~\$12 million and seven years defeating Pacific Rim’s claim *for the crime of not issuing a permit*; Panama now faces multibillion-dollar claims for closing Cobre Panamá ([MiningWatch](#)). Stabilization clauses in mining contracts can freeze regulation for decades. Lesson: *the agreement you sign today is also a weapon against the better law you pass tomorrow.*

Resettlement and the jobs mirage. Resettlement “with full compensation” recurrently delivers worse land, broken livelihoods, and cash that evaporates (Mozambique’s coal resettlements are the canonical case). Jobs promises collide with automation: a modern mine employs hundreds, not tens of thousands, and “local employment” quietly means the provincial capital, not the village.

The meta-lesson the cynics agree on (and it’s really Section 3’s lesson inverted): agreements fail where communities lack three things — *independent lawyers at negotiation, independent auditors during operation, and an enforcement forum they can actually reach*. Every success story has at least two of the three. Every nightmare has none.

8. Who Dusoma and UPAN Can Connect With

African community-power networks (start here — these are the peers): [WoMin](#) (African ecofeminist alliance on extractives — the strongest values-fit with Dusoma’s multi-marginalized-communities focus; also in the [Grassroots Justice Network](#)); [AFREWATCH](#) (DRC, Emmanuel Umpula — the credible Congolese investigator of mining abuses); the *Congo n’est pas à vendre* coalition (Jean-Claude Mputu — quoted throughout your USASIP reports); MACUA/WAMUA (South Africa’s mining-affected community movements — the SLP auditors above); Publish What You Pay’s national chapters across Africa; Southern Africa Resource Watch; and the [Resource Justice Network](#), which is explicitly seeking a common African civil-society vision on transition minerals — an open door for UPAN.

The convening: the **Alternative Mining Indaba** (Cape Town, each February, opposite the industry’s Investing in African Mining Indaba) — the continent’s civil-society mining assembly ([2026 edition coverage](#), [WCC on the faith-community presence](#)). UPAN hosting a session there is the natural in-person complement to the online series.

Technical and legal muscle (the scarce resources communities lack): Namati / Grassroots Justice Network (community paralegals); the International Senior Lawyers Project and the African Legal Support Facility (AfDB) — both put experienced negotiation lawyers on the community/government side of the table; CCSI and NRGi (contract analysis, [resourcecontracts.org](#)); the Danish Institute for Human Rights (HRIA tools); IRMA (communities hold governance seats); [The Impact Facility](#) and the Fair Cobalt Alliance (ASM improvement).

Investigators and amplifiers: RAID, Global Witness, Amnesty’s business & human rights team, Business & Human Rights Resource Centre (their Transition Minerals Tracker is the running database of allegations), MiningWatch Canada, Earthworks, Oakland Institute (already central to your USASIP criticism report).

Researchers: the Centre for Social Responsibility in Mining (Univ. of Queensland — Deanna Kemp’s group, the leading scholars of mine-community “social performance”); OPHI at Oxford (measurement); Nottingham Rights Lab (supply-chain slavery evidence); CALS at Wits (legal audit).

9. Hosting the Discussions on UPAN — A Six-Session Online Series

Working title: **“Whose Mine Is It? Making Mining Agreements Work for the People Who Live There.”** Six sessions, 90 minutes each, monthly — enough runway to build audience and land partners; timed so the series concludes ahead of the February Alternative Mining Indaba, where UPAN presents the output in person.

Session 1 — The \$500M Question. What the U.S.-Africa Strategic Investment Program (and the wider minerals rush) means for communities. You already hold the research (this project’s USASIP reports). Invite: a Congolese civil-society voice (CNPAV/AFREWATCH) + a pragmatic African-government or AMDC voice. Frame: neither cheerleading nor pure refusal — *what would it take for this money to reach the ground?*

Session 2 — When Communities Won. Red Dog, Canadian IBAs, Panama, Bougainville. Invite: an IBA negotiator or O’Faircheallaigh; a Panama movement organizer. The lesson to surface: ownership and consequence, not consultation.

Session 3 — The Autopsy. The cynical session, and likely your best-attended: SLPs, the 0.3% fund, audit theater. Invite: MACUA/WAMUA + CALS (their own reports); a reformed(!) auditor if you can find one.

Session 4 — The Contract Clinic. Hands-on: read a real CDA from the SDSG library live, clause by clause, sorting enforceable from decorative (Section 5’s three bins as the worksheet). Invite: ISLP or ALSF lawyer + a community paralegal from Namati’s network. This session is where the series stops being commentary and becomes capability.

Session 5 — Measuring What Matters. Baselines, MPI, community-led monitoring — and Dusoma’s own offer: what would a community-owned data-and-monitoring commons look like? (Marla AI demo territory; also your quiet USASIP-subrecipient positioning.)

Session 6 — The People’s Term Sheet. The series’ deliverable: a one-page, plain-language standard — *what any mining agreement in our communities must contain* — drafted across the series with audience input, published in EN/FR/SW under UPAN’s name, presented at the Alternative Mining Indaba, and usable by every member org in negotiations and advocacy. This artifact is also a fundraising asset: it is exactly the kind of concrete, African-led governance product that philanthropy (and, with careful framing, even USASIP primes looking for legitimacy partners) will pay to scale.

Production notes: record everything and publish short briefs after each session (the writing compounds); pay community speakers honoraria; run FR/EN interpretation minimum (SW where relevant); use the criticism report’s Section 5b voices as your invitation list seed; co-brand each session with one partner org from Section 8 — six sessions, six new institutional relationships for UPAN.

10. How This Connects Back to the Money

One paragraph of strategy, since this lives in your fundraising project: this learning agenda is not a detour from fundraising — it is positioning. The USASIP analysis showed the fundable niche (minerals governance, transparency, workforce, community benefit) and

the reputational minefield around it. An organization that has publicly hosted the continent's sharpest conversation about making mining agreements real, published a People's Term Sheet, and built a community-owned monitoring capability is simultaneously: a credible subrecipient for governance primes, a credible grantee for the philanthropies that fund extractives accountability (Ford, Luminate, OSF-successor funds, 11th Hour — verify current programs), and — most importantly — unbuyable, because its legitimacy runs through the communities, not the funder.

11. Bibliography

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Networks & convenings: [WoMin network \(Namati profile\)](#) · [AFREWATCH \(Namati profile\)](#) · [Resource Justice Network — common vision for transition minerals](#) · [BHRRC —](#)

[Alternative Mining Indaba outcomes](#) · [WCC — faith leaders at 2026 AMI](#) · [The Impact Facility — future-proofing African mining communities](#) · [Press coverage — AMI marches](#).

Uganda (UPAN-relevant law): [Uganda Mining and Minerals Act 2022 \(FAOLEX\)](#) · [ACME — overview of the new law](#) · [African Mining Legislation Atlas — Uganda](#) · [Monitor — how mining entities cheat Ugandans out of royalties](#) · [ALOM — investor view of the 2022 Act](#).

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Genocide by Denial, Again

How “Trade, Not Aid” Kills — the U.S.-Africa Strategic Investment Program Read in the Register of Peter Mugenyi

Prepared for K — August 4, 2026 A note on what this is: You asked for the case against, at full strength, as unsparing as *Genocide by Denial* itself. This is that case — the prosecution’s brief, written in the tradition and structure of Mugenyi’s book, with every factual claim sourced (Section 9). The companion multi-perspective report in this project holds the rest of the trial. Mugenyi himself modeled this honesty: his chapter “Do Patents Really Kill?” took the defense seriously before demolishing it. So does Section 8 here.

1. The Thesis, in His Words

In 2008, Peter Mugenyi — the Ugandan physician who built his country’s AIDS treatment system while burying his own patients for lack of drugs that already existed — wrote this:

“I have no doubt that genocide most foul, mainly by denial, was committed and continues to date at a lower but still devastating level. The carnage was allowed to go overboard, under the cover of the current TRIPS (Trade Related Aspects of Intellectual Property Rights), patents laws and World Trade Organisation (WTO) regulations, that authorised the Big Pharma to maintain monopoly rights on the life-saving drugs that made them too costly - out of reach of the poor... The AIDS catastrophe has demonstrated so much that is tragically wrong with the current world order, which allowed genocide of this magnitude to happen – **legally!**”

Hold on to the structure of that indictment, because it is a template with three parts. **First:** the means of survival existed — the drugs were on the shelf. **Second:** a legal architecture of trade — treaties, patents, tribunals, all of it lawful, all of it signed — placed those means out of reach of the poor, because the poor were not a market. **Third:** the whole thing was wrapped in denial — the publicity of “very generous donations,” the Western viewer writing to Mugenyi’s clinic in astonishment, “*We were told that AIDS was no longer a problem.*” Twenty-five million people were dead by 2006, eight thousand a day at the peak, and, as he insisted on every page, *these deaths were not inevitable.*

Now set the template on 2025–2026 and watch it lock into place.

2. The Gathering Storm — What Was Taken

The means of survival existed. This time they were not pills on a patent-protected shelf; they were programs already running — PEPFAR clinics dosing millions with the very antiretrovirals Mugenyi fought for, malaria nets, therapeutic food, TB regimens, maternal clinics. Then, in the space of weeks in early 2025, the world’s largest funder of that machinery fed it — the phrase is Elon Musk’s own, boasted in public — “into the wood chipper.” Musk, the richest man alive, whose companies’ commercial interests span the same continent, pronounced USAID “a criminal organization” whose time it was “to die,”

and the administration he served executed the sentence: roughly 83% of USAID's programs terminated, the sixty-year-old agency dissolved into the State Department by July 2025.

What replaced it has a name and a number, and both are in your project files: the accounts that once funded Development Assistance were consolidated into a "National Security Investment Program," and its Africa flagship is a \$500 million grant competition — the U.S.-Africa Strategic Investment Program — whose objectives are critical minerals and commercial diplomacy, whose scoring rubric rewards projects that "de-risk and catalyze investment from high-quality U.S. and U.S.-aligned companies," and whose key performance indicator is, literally, the volume of minerals transiting a railway. Search that document for the word *poverty*. Search it for *health* as a human outcome rather than a U.S. export sector. Search it for *human rights*. The words are not there. That absence is not an oversight; a twenty-one-page federal document is a deliberate artifact. The absence is the policy.

3. Times of Despair — The Count

Mugenyi's arithmetic was 8,000 deaths a day and 25 million dead, and his rage was that the number was knowable and known. Today's counters are running again, staffed by the same kind of epidemiologists who counted then. The [Lancet impact evaluation](#) — which first established that two decades of USAID programming had *prevented* on the order of 90 million deaths — projects that sustained defunding produces **more than 14 million avoidable deaths by 2030, including about 4.5 million children under five** ([UCLA summary](#), [ISGlobal](#), [CIDRAP](#)). The real-time trackers — imperfect, modeled, honest about it — [counted over 760,000 deaths attributable to the cuts by late 2025, with the Center for Global Development's range running 500,000 to 1.6 million](#). Pick the lowest number in that range and it already exceeds the Rwandan genocide. These are modeled estimates; so were the numbers that finally shamed the world into PEPFAR, and the men disputing them today are not offering better models. They are offering *no* model, which is the point of Section 5.

Mugenyi's most unbearable pages are not statistics. They are the woman who put her month's supply of antiretrovirals on his desk and walked away — "*Taking the drugs while my family dies makes me feel like a wicked witch!... As for me I will die with my family*" — because the programs gave out too few drugs for a killer disease. And the orphan Molly, explaining her fate on American television: "*My friend will live because she has the drugs, and I will die because I don't.*" Every clinic that lost PEPFAR funding in 2025 recreated that scene. The clinicians rationing remaining stock today are performing exactly the choice Mugenyi called the one "that only God should make." We do not lack for the anecdotes; we lack, as then, for anyone in power obliged to listen to them.

4. Survival Is for the Rich — The Trade Architecture

Here is where the parallel stops being rhetorical and becomes structural. Mugenyi's genius was to see past the villains to the *architecture*: it was not that any pharmaceutical executive wanted Ugandans dead; it was that a lawful trade regime — TRIPS, patents, WTO enforcement — made their deaths the routine byproduct of protecting profit, and made challenging it "like a bird kicking the ocean." He watched Brazil threatened with sanctions

for daring to break patents to save its citizens, and warned that when Africa's turn came, the fight would make "the first round look like child's play."

The 2026 architecture is different in every detail and identical in function. The instrument is no longer the patent; it is the *purpose-locked assistance program and the minerals deal*. The \$500 million that stands where Africa's development assistance stood is contractually aimed at U.S. supply-chain security — the APS requires recipients to "demonstrate alignment with or a commitment to advancing U.S. supply chain goals." The bilateral frame is tariffs for minerals: South Africa's vehicle exports collapsed over 80% under new duties, Lesotho's textile workers were hit with 50% tariffs, while the DRC, Guinea, Rwanda, Burundi and Morocco signed minerals agreements, and an economist in Johannesburg said the quiet part: the U.S. "*risks leaving Africa behind once [it has] gotten what it wanted, which will probably be critical minerals.*" A South African NGO called it "economic warfare." A Congolese coalition called it "a race for minerals at any cost" in which "human rights, justice and environmental protection are the biggest blind spots." Congolese lawyers took their own government to constitutional court over a deal negotiated, as ever, "in total opacity."

And the beneficiaries are not abstractions. The Oakland Institute's ledger of the DRC arrangement reads like Mugenyi's Big Pharma lobby with the names updated: a coltan concession negotiated by a company chaired by a Trump campaign finance co-chair; mineral-security enforcement contracted to Erik Prince; a \$100,000-a-month lobbying retainer to a Trump super-donor's firm; a lithium venture backed by billionaires who wrote seven-figure inauguration checks. The man with the wood chipper is himself the largest industrial consumer of exactly the minerals this program exists to secure — batteries for the cars, cobalt and copper and lithium — and his satellite company was collecting African operating licenses in the same seasons the tariffs and aid terminations landed. Mugenyi: "*victims of diseases are viewed like any other lucrative business opportunity.*" Strike diseases, write *mineral provinces*, and the sentence has not aged a day.

The DRC's mining law grants communities 0.3% of revenue, and the government's own audit found even that mismanaged. In Mugenyi's day the poor were priced out of the medicine. In ours they are priced *into* the supply chain — at three-tenths of a cent on the dollar — while the assistance budget that once treated their children pays instead for geological mapping to de-risk the extraction. It is all, as he would be the first to note, perfectly **legal**.

5. Tragic Denial — The Wicked Witch Problem

Mugenyi devoted a chapter to denial because denial is what converts a catastrophe into a *genocide by denial*: the refusal, by those with power to act, to admit that the dying is real and caused. His specimens were the pharmaceutical publicity machine ("very generous donations... announced in a flurry of publicity extravaganza") and the manufactured ignorance of Western publics.

The 2025–2026 specimens are on the record. The Secretary of State [testified to Congress that no one had died because of the cuts](#) — a claim so insupportable that the House Foreign Affairs ranking member formally demanded the evidence behind it, evidence that has not

materialized, because the department that would have gathered it was the one fed into the wood chipper. When Bono cited the trackers' death estimates, [the response from Musk and his interviewer was to call him a "liar/idiot"](#) — not to produce a competing count, but to jeer the counting itself. And the program documents perform the softest, most sophisticated denial of all: the language of *"opportunity over dependency, investment over assistance"* — in which ending the medicine is rebranded as respecting the patient, and the deaths, being nobody's line item, are nobody's fault. Mugenyi heard precisely this melody in the 1990s, when the world explained that treating Africans was "not cost-effective" and that prevention alone was Africa's lot; he called it what it was: *"It emerged that so many lives did not really mean much as long as they were poor."*

Deny the count, defund the counters, dress the withdrawal in the vocabulary of empowerment. That is the denial apparatus, then and now. The only structural difference: TRIPS at least never claimed the patents were *for* the patients.

6. When the Vultures Come Flying In

Mugenyi's chapter title for the profiteers who circled Uganda's dying — quack cures, opportunists, extractors of hope — supplies the correct heading for what your USASIP criticism report documented: the bid shops indexing the \$500 million within days; the consultancies rebranding development practices as "commercial diplomacy"; the politically wired newcomers arriving at the minerals table with no mining record and excellent wedding invitations. None of this is illegal. Neither was anything in his book. That was his entire point.

7. The Next Inferno — He Told Us

The epilogue of *Genocide by Denial* is titled "The Next Inferno," and reading it in 2026 raises the hair on your arms. He warned that the architecture that had just killed 25 million people remained standing — *"the current drug patents TRIPS and WTO laws do not give, humanity, especially the poor, a good fighting chance of escaping with their lives. Yet the needed rectification of these laws is vigorously opposed in order to protect insatiable business interests"* — and predicted that when the next catastrophe came, the same machinery would produce the same triage. He was wrong in only one respect: he imagined the next inferno as a new pathogen. He did not imagine that the world would simply *reverse the one victory he had won*. PEPFAR — the program he was summoned to Washington to help conceive, the "glimmer of hope" his book allows itself — is the thing now going through the chipper, and the 14-million projection is substantially the arithmetic of his own patients' children losing their drugs. The sequel to *Genocide by Denial* is not a hypothetical. It is a Lancet paper with confidence intervals.

8. Do Supply Chains Really Kill? — Taking the Defense Seriously

Mugenyi asked "Do Patents Really Kill?" and answered by engaging the strongest case for patents — innovation needs profit — before showing its limits: drugs for unprofitable diseases were not developed at all, and *"no one I know has ever claimed that the AIDS drugs were developed for the poor who were in most desperate need."* The equivalent defense today

deserves the same treatment. It runs: African governments themselves want trade over aid; dependency was real and corrosive; minerals revenue could dwarf aid flows if governance holds; the deaths attributed to the cuts are modeled, not enumerated; and a \$500M governance program is not what killed anyone — the *termination of health programs* is, and those are separable policies. Some of this is true. Several African finance ministries prefer this administration's transactionalism to the last one's conditionality; the DRC government publicly praises the partnership; and the strongest version — that aid dependency at 2024 levels was itself a slow catastrophe — is held by serious African economists in good faith.

But the defense fails exactly where the patent defense failed, on the evidence of the documents themselves. If "trade not aid" were a development strategy rather than an extraction strategy, its flagship program would carry the fingerprints of development: a health carve-out, a community-benefit floor above 0.3%, a human-rights condition on minerals partners, an African-priorities test. The APS contains none of these — and its authors, who found room for anti-DEI certifications and dollar-based payment-rail objectives, are not careless drafters. The tell, as always, is not what the architecture says; it is what it *cannot be bothered to say*. Mugenyi's test was never intent — he readily conceded no executive wanted Africans dead. His test was whether the system's designers, once shown the bodies, changed the system. TRIPS's designers, shown the bodies, offered "minor amendments... not even robust enough to solve the current AIDS crisis." This administration, shown the trackers, said *no one has died*. By Mugenyi's own standard, the verdict follows.

9. What He Would Have Us Do

The book does not end in despair; it ends in instruction. "*The remaining hope for the world, especially the poor people, is the inherent goodness within humanity that must recapture the higher moral ground.*" Concretely, in his story, that meant: count the dead and publish the count (the activists' numbers broke the patent wall); name the architecture, not just the villains (TRIPS, not just Pfizer — today: NSIP, the APS scoring rubric, and the 0.3%, not just Musk); force the moral witnesses into the rooms of power (his Congress testimony begat PEPFAR — today's equivalents are the trackers' authors, the Congolese constitutional petitioners, and voices like the woman with the drugs on the desk, who must be put in front of appropriators before the FY2027 "America First Opportunity Fund" makes this permanent); and build African treatment — today, African *ownership* — capacity that no foreign budget cycle can erase. That last is your Red Dog finding from the mining report, and it is also, precisely, what a UPAN discussion series and a People's Term Sheet are for. Mugenyi built ART clinics under a regime designed to make them impossible. The assignment has not changed; only the commodity has.

Coda — the two sentences that carry the whole argument. From 1989, his mother, standing in the epidemic: "*What kind of a monster disease is this that kills a man, his wife and all their children, thus closing the entire homestead?*" From 2026, the answer his book taught us to give: the monster was never only the disease. It was the paperwork.

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War-Room Memo: The Red Dog Play for the \$500M

For the counsel who wrote the Alaska agreement — four business days, one program, and the chance to set the African standard

August 4, 2026. Window 1 SOIs due August 21 (17 days). Window 2 questions due September 11; Window 2 SOIs due November 30. Premise: You are the world's leading legal advocate for community mine ownership. You've read the APS, the criticism file, and the mining-rights literature (all in this project). You know the one thing nobody else at this table knows: *what a real agreement looks like, because you wrote one*. This memo is your first four days.

0. The Strategic Read — Why You, Why Now

Three facts from the documents define your leverage.

First, the program's structure is open but its imagination is closed. The APS explicitly seeks "transaction advisory services, feasibility studies, and targeted technical assistance to African governments" and "workforce localization," and scores 20% of every application on "leverage and partnerships." Nothing in the scoring rubric *prevents* community equity, escalating royalties, or enforceable benefit terms — the drafters simply never thought of them. A program that never says "human rights" also never says communities *can't* own the upside. Silence is a door.

Second, the field is about to be captured by people who will do this badly. The Window 1 pool (Aug 21) is insiders: contractors and advisory firms who will write "stakeholder engagement" boilerplate because it's what they know. Every SOI filed without community-ownership terms makes the bad standard the de facto standard. You have 17 days to make the *good* standard available — and reputationally costly to omit.

Third, dignity is this program's competitive argument, not its charity case. The pitch that wins in Washington is not "be kinder." It is: *community equity is the anti-China differentiator*. Beijing can offer capital, speed, and infrastructure; the one thing it structurally cannot offer is legitimate, community-consented, litigation-proof supply chains. Red Dog terms are not a tax on the strategy — they are the strategy's only durable moat. That reframe is your master key to every room: State, primes, hawks, and African ministries alike.

Your position has one asymmetry to exploit ruthlessly: **you are the only actor who can talk to all four audiences in their own language** — the Bureau (federal grant law), the primes (risk and scoring), the movements (justice and receipts), and the mining companies (deal certainty). Nobody else in this ecosystem holds all four passports.

1. Who You Partner With

Build four rings, in this order, because each ring recruits the next.

Ring 1 — The legal spine (call them Day 1). International Senior Lawyers Project and the African Legal Support Facility (AfDB) — the two institutions that already put negotiation counsel on the government/community side; you are offering them a program-funded force multiplier. Columbia Center on Sustainable Investment (contract architecture, the CDA database — they wrote the literature) and NRGI (fiscal terms, resourcecontracts.org). Namati's Grassroots Justice Network for the paralegal layer — because a term sheet no village paralegal can enforce is decoration, and you of all people know it.

Ring 2 — The legitimacy holders (call them Day 1-2, before you publish anything). WoMin (the African ecofeminist extractives alliance — the values anchor), AFREWATCH and the *Congo n'est pas à vendre* coalition (DRC credibility; Mputu's "biggest blind spots" quote is your Exhibit A), MACUA/WAMUA (South Africa — they audited the SLP failure and will smell decoration instantly), Publish What You Pay chapters, and the Resource Justice Network — which is *publicly asking* for a common African vision on transition minerals right now. Your standard answers their open call. Nothing you publish carries weight unless these names co-sign; their endorsement is the product, your drafting is merely the pen. Dusoma/UPAN sits in this ring as convener and data partner — the UPAN online series is your public square, and a community-owned baseline/monitoring capability (the Marla AI play from the mining report) is the measurement clause of your standard made flesh.

Ring 3 — The delivery vehicles (Day 2-3). Two or three of the big implementers (the DAI/Chemonics/Palladium tier) plus a business council. You are not endorsing them; you are *pricing legitimacy for them*: adopt the standard, name Ring 2 organizations as scored subrecipients, retain community-side counsel — and their SOI beats the identical SOI without it on the 20% leverage criterion, while inoculating them against the Oakland Institute critique they have all read. One prime adopting the standard forces the others to match it. That's how standards win: not by persuasion, by competitive contagion.

Ring 4 — The air cover (Day 3-4). The China-hawk flank (FDD's audience — sell the moat argument), congressional oversight both parties (Meeks's office is already demanding mortality answers; Barrasso's needs the "durable supply chains require consent" version), African institutions for continental legitimacy (the AU's Africa Mining Vision is your normative anchor — your standard is AMV implementation, not foreign imposition), and IRMA for the audit architecture. Faith networks (the WCC/AMI ecosystem) reach mine-adjacent communities no NGO reaches.

2. The Four Business Days

Day 1 (Tuesday) — Decide the plays and open the phones. Morning: lock the three-play strategy — (A) *the Standard*, (B) *the Record*, (C) *the Bid* — and assign owners. Afternoon: Ring 1 and Ring 2 calls; ask each for two things only — co-endorsement in principle of a five-term community standard, and one name for the drafting circle. Evening: your associates begin the SOI drafts (Play C below) and the question set (Play B).

Day 2 (Wednesday) — Draft the African Community Minerals Standard. One page, five non-negotiables, written by you with Ring 2's pens in the room. The Red Dog terms,

translated: (1) an **escalating community royalty** paid into an independently governed trust — starting low, stepping up on schedule toward a meaningful share of net proceeds, exactly the NANA escalator, not the DRC's flat 0.3%; (2) a **community equity option** exercisable at defined milestones; (3) **independent audit with published results** (IRMA-grade), auditor selected with community consent; (4) **enforceable arbitration the community can invoke, with the company funding community counsel** — your career in one clause: who can sue, over what number, in which forum, and who pays their lawyer; (5) a **published contract and a pre-operation wellbeing baseline** (MPI-style, community-defined dimensions) with repeat waves written into the agreement. Name it something ownable — *the Kasensero Standard*, the *People's Term Sheet* — and version it: full version for negotiators, one-pager for the public, two-paragraph annex formatted for SOI writers to paste.

Day 3 (Thursday) — Sell it to the applicants. Morning: prime briefings (Ring 3) — twenty minutes each, the pitch above, leave-behind is the annex. Offer three concrete asks: adopt the annex verbatim in your SOI, name at least one Ring 2 organization as a scored subrecipient, and budget community-side counsel as a line item. Afternoon: the community-org channel — a briefing note through UPAN, PWYP, and the aggregator ecosystem (fundsforNGOs' audience) saying honestly: *most of you should not prime this; here is the subrecipient checklist; here is who is assembling consortia; do not burn a concept in a rushed Window 1 SOI — a rejected SOI can never be resubmitted. Aim at Window 2, November 30, together.* You will save fifty organizations from wasting their one shot, and every one of them becomes your network.

Day 4 (Friday) — Make the record and go public. Morning: submit your question set to AF-A-Proposals@state.gov for the Window 2 Q&A (due September 11) — this is litigation thinking applied to grantmaking, because *answers are published on grants.gov and bind the field*. Ten questions drafted so that any answer helps: "Will community benefit-sharing arrangements, including community equity and escalating royalties, be viewed favorably under the leverage criterion?" "May the value of community-contributed land access and social license be counted as non-USG resource contribution?" "Are African community-based organizations eligible subrecipients, and does their participation strengthen the partnership score?" "Would a project establishing community-side transaction advisory capacity qualify under the stated 'transaction advisory services' solution area?" State says yes: you've made community terms officially score-relevant, on the record, for every applicant. State says no or dodges: you've generated the documentary evidence for Ring 4 and the press. Heads you win the program, tails you win the argument. Afternoon: file **Play C** — your firm's own Window 1 SOI (two pages, emailed, no SAM registration needed at this stage): an **African Community Transaction Advisory Facility** — program-funded, world-class deal counsel and geological/financial analysis on the *community and host-government side* of minerals negotiations, delivered with ALSF/ISLP/CCSI, measured by the APS's own KPIs (officials trained, transparent transactions closed, government revenue increased). It is the jiu-jitsu bid: their money, their scoring rubric, their KPIs — funding your life's work. Hold your second SOI slot for a Window 2 consortium with Ring 2. Then launch the public layer (Section 3) and send the Bureau a courteous two-page letter — the standard attached — offering your firm's assistance "in ensuring awarded projects

generate the durable, litigation-proof investments the program seeks.” Courteous, useful, and unmistakably a marker: *the community bar is now present in this program*.

3. The Public Sequence — Before It’s Even Due

Order matters: **allies** → **applicants** → **record** → **public**. You brief Ring 2 before Ring 3, Ring 3 before you publish, and you never surprise your co-signers with their own names. Then, starting Day 4 and running the two weeks to the Window 1 deadline and beyond:

The thread (X/LinkedIn, your voice): “I negotiated the agreement that sends a majority share of a great mine’s proceeds to the Indigenous people who own it. The US just put \$500M on the table for African minerals. Here’s what the paperwork doesn’t say — and the five clauses that would change everything.” Post the one-pager. Tag the primes. The StatiSense audience — the same viral channel that carried the program announcement to African businesses — is your distribution rail; feed them the standard in their format (a summary graphic).

The op-ed (place two versions): African Business / The Africa Report for the continental audience (“The \$500M question: will a single African community own a share of what’s under their feet?”) and a DC outlet for the policy audience, making the moat argument (“The only minerals strategy China can’t copy is consent”). Offer Mputu or a WoMin leader co-authorship on the first — their byline, your pen, if they want it.

The UPAN webinar, moved up: “Whose \$500M Is It? — What Applicants and Communities Need to Know Before the Deadlines.” Session 1 of the planned series, now with a news hook and a deliverable: the standard, the subrecipient checklist, and the Window 2 timeline. Invite applicants *and* community orgs into the same (virtual) room — the unusualness of that is the story.

The drumbeat to November 30: weekly — one published Q&A analysis when State’s answers post; one “consortium corner” connecting a prime with Ring 2 partners; one community voice (the Al Jazeera Goma quotes ecosystem) so the campaign never becomes lawyers talking to lawyers. Everything archives to UPAN and this project.

4. What Winning Looks Like

By Friday: the standard exists with African co-signers, your questions are in the official record, your SOI is filed, three primes have the annex, and the public narrative has a protagonist. By September 11: State’s published answers make community terms score-relevant (or their refusal makes news). By November 30: multiple Window 2 SOIs — including yours — carry Red Dog terms and Ring 2 subrecipients. By award season: at least one funded project contains an escalating community royalty and enforceable arbitration, and every future African minerals negotiation cites it the way every IBA negotiation cites Red Dog. That is how a single agreement becomes a standard — you’ve done it once. The difference this time: the money is already appropriated, the deadline is already printed, and the other side’s own scoring rubric is the door you walk through.

Companion documents in this project: the USASIP logistics and criticism reports (the evidence file), the mining-rights learning report (the precedents and the networks), and “Genocide by Denial, Again” (the moral case — use sparingly in public, fully in private).

U.S.-Africa Strategic Investment Program — Full Source Library

Every source encountered during research, August 4, 2026. Organized by theme. Items marked ★ were read/fetched in depth; others surfaced in searches and are queued for deeper reading.

The opportunity itself (primary sources)

- ★ Uploaded APS document: *20260723_AF-A_Annual_Program_Statement_FINAL.pdf* (21 pp., read in full — the authoritative source for all logistics in the report)
- ★ Official APS PDF on grants.gov (same document)
- Opportunity listing — simpler.grants.gov (DFOP0019410)
- U.S. Embassy Malawi — funding opportunity notice
- U.S. Embassy Cameroon — funding opportunity notice
- State Dept — Foreign Assistance policy page
- State Dept — Office of Foreign Assistance Oversight
- State Dept — “America First in Africa” release, Bureau of African Affairs, March 2026 (*fetch blocked — access directly*)

Grant aggregators & bid shops covering it (the “insiders already know” signal)

- fundsforNGOs listing
- DevelopmentAid grant listing (full eligible-country list)
- federalgrants.com listing
- GTC 360° Advisors grant listing
- Bid Banana (The Bid Lab) listing
- StatiSense on X — viral summary graphic (“up to 100 businesses expected to benefit”)

Enthusiast / hawkish takes (who’s excited)

- FDD: “The State Department’s \$500 Million Bet To Beat China on African Minerals” (Jul 29, 2026) (*fetch blocked by redirects — read directly*)
- FDD Overnight Brief, July 30, 2026
- U.S.-Cuba Trade and Economic Council: “Readying an Off-The-Shelf Solution?” — admiring look at the APS as a template (Jul 28, 2026)
- The Diplomatic Insight: “Washington to Invest \$500 Million on Africa’s Mineral Wealth”
- Rio Times: “Congo Praises US Partnership as Critical Minerals Race Intensifies”
- African Business: “US makes pitch for Africa’s critical minerals” (Feb 2026)

History & context: the post-USAID “trade not aid” pivot

- ★ ORF: “From Aid to Investment: The US Recasts Its Africa Strategy through SIWG” (read in full — key source on USAID dismantlement numbers, SIWG, risks)
- Capital Newspaper (Ethiopia) — same ORF analysis, African republication

- ★ PBS NewsHour: “Trump’s pivot to trade-not-aid leaves African nations wary” (read in full — African reactions, tariff damage numbers)
- Reuters via Yahoo: “US shifting Africa strategy to ‘trade, not aid’, envoy says” (AOL mirror)
- News On Air (India): “Trump says US shifting Africa policy from aid to trade”
- GlobalSecurity.org: Trump “aid to trade” statement (Jul 2025)
- AllAfrica: “U.S. Pivots to Six-Point Trade Strategy for Africa” (May 2025)
- S&P Global Commodity Insights: “Experts consider US approach to Africa’s critical minerals under Trump”
- Wikipedia: Bureau of African Affairs

The State Department’s capacity to actually run this (Devex reporting)

- Devex: “State Department scrambles to rebuild foreign aid workforce”
- ★ Devex: “For the US, getting money out the door is getting to be a real pain” (partially paywalled)
- Devex Newswire: “US State Department plans new disaster response bureau”

Critics: minerals deals, human rights, extraction (who’s upset)

- ★ Oakland Institute: “Profit off Peace? — the corporations poised to benefit from the DRC peace deal” (read in full — names all ten corporate beneficiaries + Trump ties)
- ★ Mongabay: “Scrutiny grows over DRC-US minerals deal, even as other African nations sign up” (Feb 2026, read in full — Mputu quotes, constitutional challenge, Guinea/Morocco/Rwanda MoUs)
- Al Jazeera: “‘We are exploited’: Congolese fear losing out as US makes minerals deals” (Feb 4, 2026)
- CSIS: “Critical Minerals, Fragile Peace: The DRC-Rwanda Deal and the Cost of Ignoring Root Causes”
- AllAfrica group view: “DR Congo’s Mineral Deal With U.S. Challenged”
- Security Council Report: Arria-formula meeting on critical minerals and resource-driven insecurity in Africa (Jul 2025)
- Rep. Cherfilus-McCormick statement on DRC-Rwanda peace
- House letter on DRC-Rwanda peace negotiations (Olszewski et al., PDF)
- Wikipedia: 2025 DRC–Rwanda peace agreement

The deals ecosystem: Project Vault, Lobito, company plays

- The Africa Report: “Project Vault to Lobito Corridor: Inside Trump’s deals to secure Africa’s critical minerals” (*403 on fetch — access directly*)
- Bloomberg: “US Finalizing \$500 Million for African Critical Minerals Railway” (Lobito, Jun 2025)
- The Oregon Group: “Congo approves rail deal after US\$753 million Lobito Corridor financing”

- Financial Afrik: “The United States and Burundi Conclude Two Mining Cooperation Agreements” (Mar 2026)
- Atlantic Council: “Mining corridors as catalysts for US-African partnership” (PDF, Feb 2026)
- Atlantic Council: “Beyond critical minerals: Capitalizing on the DRC’s vast opportunities”

Congressional record

- Senate Foreign Relations testimony — Pratt (Jul 30, 2025, PDF)
- Senate Foreign Relations testimony — Woodard (Jul 30, 2025, PDF)
- Senate Foreign Relations testimony — Phee (PDF)
- Sen. Barrasso release referencing African minerals

Peripheral hits (surfaced in searches; low relevance but logged for completeness)

- africa-hr.com: USAID funding compliance for companies & NGOs in Africa
- Grantsights: USAID Grants Guide 2026
- MEXC news aggregator item on Africa trade
- Wikipedia: Department of Mineral Resources (South Africa)

Quick Facts — USASIP at a Glance

The grant. U.S.-Africa Strategic Investment Program (“USASIP” is our shorthand — officials know it as opportunity DFOP0019410). Announced July 23, 2026 by the U.S. State Department’s Bureau of African Affairs. Listing: simpler.grants.gov/opportunity/76fb8005-b683-4691-868f-fc0d986088ca. Applications go by email to AF-A-Proposals@state.gov, opportunity number in the subject line.

The money. \$500 million total in one shared pot — not split between rounds. About 10 awards of \$5M–\$50M each, lasting 1–3 years. Every dollar must be committed by September 30, 2027. Paid out through the HHS Payment Management System (U.S. orgs) or by reimbursement (non-U.S. orgs).

The four rounds, plainly. Each round: send a short application by the due date, wait about three months, get a yes/no email. Round 1: due Aug 21, 2026 → answers by Nov 29. Round 2: due Nov 30, 2026 → answers by Mar 1, 2027 (questions due Sept 11; answers published ~Sept 29). Round 3: due Mar 1, 2027 → answers May 29. Round 4: due May 31, 2027 → answers Aug 29 — one month before the money expires, so effectively too late for big awards. Early winners drain the pot first: the real money goes in Rounds 1 and 2. Aim for Round 2.

What it funds. Mining and mining-adjacent tech only: minerals governance, geological data, local processing, mine workforce training, deal advisory (Track 1); plus the energy, telecom, AI/cloud, and customs infrastructure around extraction and U.S. market entry (Track 2). Not funded: health, education, human rights, agriculture, humanitarian work — those words don’t appear in the document.

It’s a plan to make a plan to make a plan. You are not proposing a mining project — construction is banned. You propose enabling-environment work (studies, maps, training, reforms) that de-risks future private investment. The process is staged the same way: 2-page concept → possible “co-design” with State → full application → award months later. You’re selling an idea, not a shovel.

What you email. One PDF: 1-page cover table, 2-page narrative, 1-page budget. Times New Roman 12pt, single-spaced, 1-inch margins, English. Max two per organization per round; a rejected concept can never be resubmitted. No SAM.gov needed for the concept stage — but it’s required later and takes 4–8 weeks, so start early.

Who decides. A Merit Review Panel scores idea 40%, capacity 25%, leverage/partnerships 20%, planning 15%; ties go to lower overhead. Final say: one senior official. No feedback to losers.

The landscape numbers. Mining companies in Africa: ~5 giants, roughly 1,000–2,000 serious formal companies (an industry database tracks ~740 mine owners with 2,200+ mines/projects), several thousand small licensed firms — and ~10 million artisanal miners working outside any company. Mines: ~1,500–2,500 industrial, several thousand small licensed, and artisanal sites in the tens or hundreds of thousands — satellite research across just five countries found ~40× more artisanal mining than ground surveys had ever

recorded. The \$500M is aimed at the mines you can see; the ten million people at the sites you can't see appear nowhere in the document.

The ten questions they should answer (submit by Sept 11; answers are published).

How much money per round? Who sits on the review panel, and who is the senior official? Will winners be published — recipient, amount, abstract? How many applied and how many advanced? What does “U.S.-aligned” mean? What happens inside co-design, and is there a record? How are conflicts with administration-connected companies screened? What share goes to African-led organizations? Will every subaward be public? What happens to unspent money as September 30, 2027 approaches?