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Colonial Continuities: European Trade Policy Secures Access to Raw Materials

Global competition for spheres of influence is in full swing. One of the aims is to secure access to raw materials needed for the energy transition and digitalization, but also for military purposes. The European Union is striving to keep pace with China and the United States. At the same time, it is heavily dependent on raw material imports from countries in the Global South. To secure access to these, the EU has developed a number of different trade policy instruments in recent years. However, these treaties and initiatives — marketed as “equal partnerships” — do not keep their promises. Instead of advancing fair trade and the global energy transition, they exacerbate existing dependencies and colonial continuities.

Germany imports over 90 percent of the raw materials it needs for its industrial production.¹ When it comes to imports of raw materials classed as critical and strategic, both Germany and the European Union as a whole are heavily dependent on just a few countries, including China (rare earths, magnesium, and graphite), South Africa (rare earths again), the Democratic Republic of Congo (cobalt), Chile (lithium), and Brazil (niobium).

These raw materials are either not found on EU territory, or have not yet been mined there. However, they are vital for European industry, especially in the areas of low-carbon technologies, digitalization, aerospace, robotics, and defence. If the risk of supply disruption is high, these materials are deemed to be “critical”. There are currently 34 raw materials on the European Union’s critical list.²

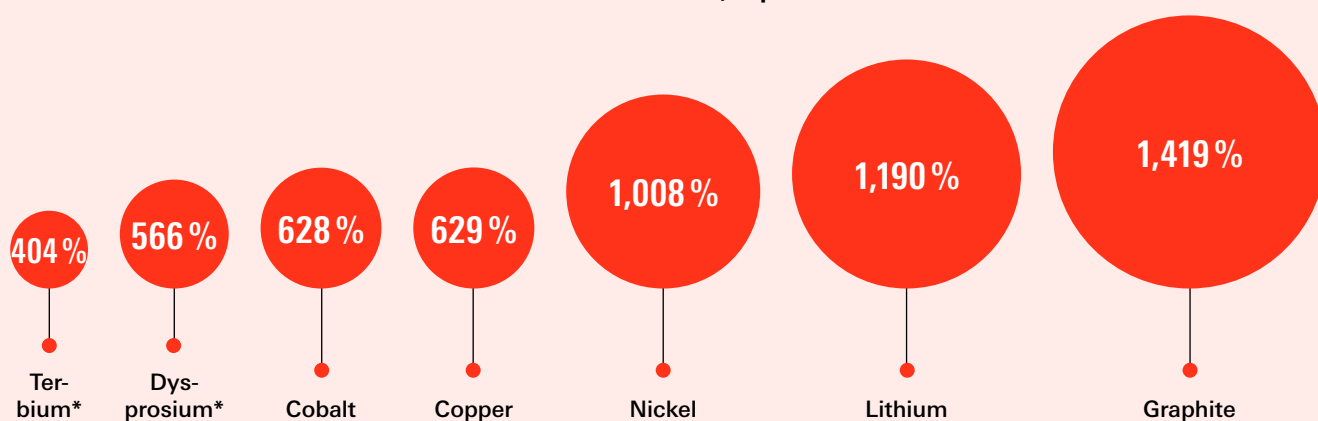
Fields of application for selected critical raw materials for the green transformation

Raw material	Batteries	Fuel cells	Electrolysers	Wind turbines	Drive motors	Photovoltaics	Heat pumps
Lithium	●						
Graphite	●	●	●				
Cobalt	●	●	●				
Nickel	●	●	●	●		●	●
Manganese	●	●	●	●			●
Rare earths		●	●				
Copper	●	●	●	●	●	●	●
Silicon		●	●	●	●	●	●

Source: Own representation based on Pérez et al.

1 Deutsches Institut für Wirtschaftsforschung (DIW), “Germany Can Increase Its Raw Material Import Security of Supply”, DIW Weekly Report 49–50/2022, www.diw.de/documents/publikationen/73/diw_01.c.862062.de/dwr-22-49-2.pdf (last accessed 25 November 2025).
2 European Commission, “Critical Raw Materials”, https://single-market-economy.ec.europa.eu/sectors/raw-materials/areas-specific-interest/critical-raw-materials_en (last accessed 25 November 2025).

Increase in EU demand for selected raw materials 2020–2030, in percent



For the high-demand scenario the study assumes rapid technological implementation of the energy transition etc. and an increase in the European market shares for clean technologies and, consequently, high consumption of raw materials. In a low-demand scenario, this process would be slower and demand for the end products would be lower.

Source: Own representation based on data from the European Commission, “Supply Chain Analysis and Material Demand Forecast”

* Rare earths

Global demand for critical raw materials for the energy transition alone could double between 2024 and 2030.³ In the case of some minerals, EU demand is even expected to increase more than tenfold.⁴ However, the majority of these materials are not used to produce solar panels and wind turbines, but for electric car manufacturing. Assuming car sales remain stable, Volkswagen’s electric car batteries in 2030 alone will need around eight times the amount of aluminium and nickel that will be required to build all the new wind turbines planned for Germany between 2022 and 2030.⁵

This massive increase in demand must be seen in the context of the fact that the EU already consumes more than 25 to 30 percent of all the metals produced worldwide, despite being home to only 6 percent of the world’s population.⁶ This means there is a distribution problem, which is exacerbated by the increasing number of armed conflicts and wars, and the escalating rearmament process being driven by the EU — and the raw materials this requires.

Europe’s Appetite for Raw Materials: A Throwback to Colonial Times

Under the guise of a “just transition that leaves no one behind”, the European Commission has launched a campaign to secure its own raw material supply.⁷ Over

the past five years, starting with the European Green Deal that European Commission President Ursula von der Leyen presented in 2019 in response to widespread climate protests, the European institutions have approved initiatives, laws, treaties, and partnerships to secure access to minerals and metals from countries in Latin America, Asia, and Africa. The goal is for Europe to become the world’s first climate-neutral continent by 2050.

Now, however, it is no longer just about climate protection, but about defence. Many critical and strategic raw materials are vital for the arms sector. A report by the Corporate Europe Observatory⁸ shows how the defence lobby influenced the legislative process that led to the Critical Raw Materials Act (CRMA) to ensure that the list of critical and strategic minerals and metals includes materials that are essential to their interests (such as titanium).

And it is not just the end products, such as military equipment, that are being criticised for the damage they cause around the world, but also the trade strategy being pursued by the European Union to secure raw materials. Despite the greenwashing and over-liberal use of the word “sustainable” in treaty documents, the strategy represents an intensification of extractive economic models in the resource-rich countries of the Global South. Spearheading the “green transformation” of Europe are private companies with little interest in the common good, but a keen interest in their own profits. Consequently,

3 International Energy Agency (IEA), “Global Critical Minerals Outlook 2024”, <https://iea.blob.core.windows.net/assets/ee01701d-1d5c-4ba8-9df6-abeeac9de99a/GlobalCriticalMineralsOutlook2024.pdf> (last accessed 25 November 2025).

4 European Commission, “Study on the Critical Materials for the EU 2023 — Final Report”, 2023, <https://op.europa.eu/en/publication-detail/-/publication/57318397-fdd4-11ed-a05c-01aa75ed71a1> (last accessed 25 November 2025).

5 PowerShift, “Rohstoffwende und Energiewende zusammen denken”, January 2023, https://power-shift.de/wp-content/uploads/2023/05/PS_066_Studie_Kreislaufwirtschaft_Web_230507.pdf (last accessed 25 November 2025).

6 European Environmental Bureau (EEB), “‘Green Mining’ is a Myth. The Case for Cutting EU Resource Consumption”, 17 September 2023, <https://eurmc.org/publication/green-mining-is-a-myth-the-case-for-cutting-eu-resource-consumption> (last accessed 25 November 2025).

7 European Commission, “The European Green Deal”, https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/european-green-deal_en (last accessed 25 November 2025).

8 Corporate Europe Observatory (CEO), “Blood on the Green Deal”, November 2023, <https://corporateeurope.org/sites/default/files/2023-11/CRM%20english%20final%20%281%29.pdf> (last accessed 25 November 2025).

the initiatives that have been set in motion are biased towards the “needs” of European businesses with global operations. The voices of stakeholders in the mining regions, environmental groups, trade unions, human rights organizations, and other civil society actors, as well as cooperatives campaigning for an energy transition in the public interest, are largely ignored.

Trade Policy Instruments to Secure Europe’s Access to Raw Materials

The Inclusion of Chapters on Energy and Raw Materials in European Trade Agreements

Since 2015, chapters on energy and raw materials have been included in European trade agreements with the aim of securing European access to energy and raw materials, and promoting sustainable development (particularly in the area of renewables).⁹ The idea is to lower barriers to trade and investment in the energy sector. State measures and regulations that distort competition or hinder trade are to be abolished. Among other things, this means:

- A ban on import and export restrictions and taxes and other duties on raw materials;
- A ban on import and export monopolies (including state monopolies) on certain raw materials. This reduces the ability of states to regulate these strategic sectors, which supposedly creates fair competitive conditions for all market actors.
- States are not allowed to fix prices for exports of raw materials. In other words, there must be no difference between the price of a raw material on the domestic market and the export price. Consequently, states cannot support their own domestic companies.
- European companies must have guaranteed access to energy infrastructure, in part so that they can export raw materials and energy sources without hindrance.

In summary: Trade agreements with chapters on energy and raw materials prevent the emergence of downstream industries in resource-rich countries. They also restrict options for generating income from the extraction of raw materials, which further limits states’ room for manoeuvre. They are biased towards securing access to raw materials for European companies and Europe’s raw material supply. This exacerbates the global division of labour, which has its origins in European colonialism.

Strategic Raw Material Partnerships

Since 2021, the European Commission has been signing strategic partnership agreements on raw materials with resource-rich countries, particularly in the Global South.¹⁰

These are non-binding agreements under international law that provide for collaboration in the raw materials sector and complement trade agreements. Once a partnership agreement has been signed, the European Commission and the partner country work out a roadmap with concrete projects, for instance in the area of sustainable value chains for raw materials and, in some cases, for hydrogen (Chile) and electric vehicle batteries (Serbia), including the implementation of trade-facilitation measures. Currently, only two roadmaps are publicly available (Ukraine and DR Congo). They do not include any concrete measures relating to environmental protection or the involvement of affected local communities, but plenty relating to investment possibilities. This criticism is also set out in a Friedrich-Ebert-Stiftung study¹¹ and in a document published by an alliance of 11 NGOs and civil society organizations¹²:

- The agreements are worded in such a general manner that they do not reflect the actual needs and circumstances of the partner countries, for instance in terms of developing their own value chains.
- Civil society actors are not involved, either during or after the negotiation process, and there is generally a lack of no transparency surrounding the strategic partnerships on raw materials.

In summary: Strategic partnerships on raw materials often contain vague declarations of intent that do not clarify how they are to be implemented in practice, particularly with regard to duties of care concerning the environment and human rights.

Global Gateway

The Global Gateway, a large-scale infrastructure initiative launched by the European Commission in 2021, comprises more than 270 projects around the world (at August 2025; see map of “Trade policy initiatives to secure European access to raw materials”).

The Global Gateway focuses primarily on climate, energy, transport and digital infrastructure, and health and education. At the same time, it is a counter-offer to China’s Belt and Road Initiative and is intended to strengthen the EU’s position particularly in regions that have seen a massive increase in Chinese investor influence.

9 European Commission, “Trade for All — Towards a More Responsible Trade and Investment Policy”, 2014, <https://op.europa.eu/en/publication-detail/-/publication/d90eda7c-7299-11e5-9317-01aa75ed71a1> (last accessed 25 November 2025).

10 European Commission, “Raw Materials Diplomacy”, https://single-market-economy.ec.europa.eu/sectors/raw-materials/areas-specific-interest/raw-materials-diplomacy_en (last accessed 25 November 2025).

11 Friedrich-Ebert-Stiftung, “Rohstoffpartnerschaften: Spannungsfeld zwischen Menschenrechten, Transformation und wirtschaftlicher Souveränität”, 2024, <https://library.fes.de/pdf-files/international/21209.pdf> (last accessed 25 November 2025).

12 FERN et al., “A Partnership of Equals? How to Strengthen the EU’s Critical Raw Materials Strategic Partnerships”, November 2023, www.fern.org/fileadmin/uploads/fern/Documents/2023/A_Partnership_of_Equals_01.pdf (last accessed 25 November 2025).

Although the focus is on promoting and financing physical infrastructure, the Global Gateway also aims to create the conditions necessary to ensure that the projects deliver. One of the goals, therefore, is to establish “attractive investment and business-friendly trading conditions”. Trade agreements and strategic partnerships are both usually associated with promises of European investment through the Global Gateway.¹³

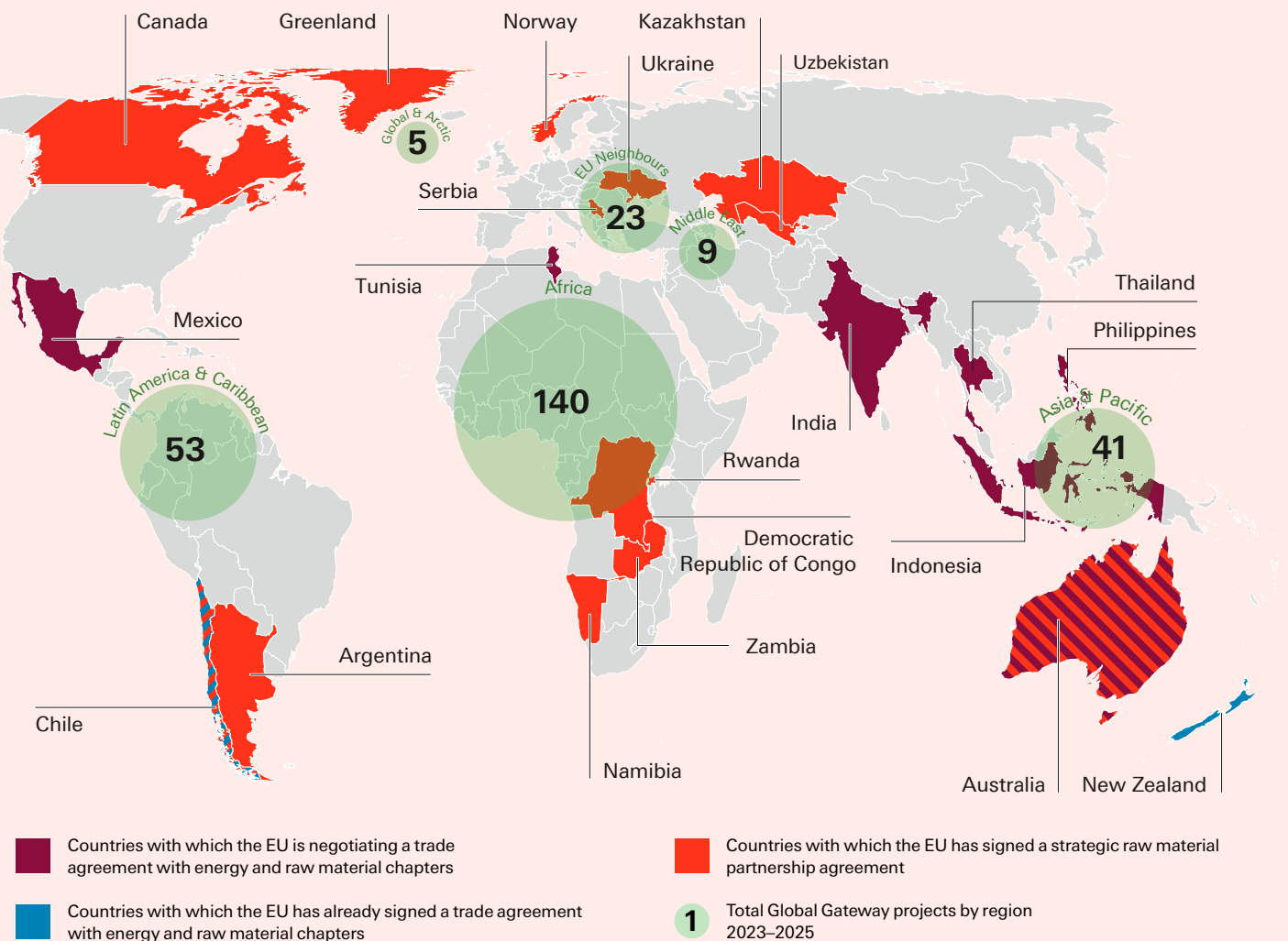
In addition, the Global Gateway is a central element of European development cooperation. It strives to use development cooperation funds to make private investments in certain areas lucrative — an approach sometimes referred to as “blended finance”. The aim is to raise 300 billion euro

through this mix of public and private finance between 2021 and 2027, of which half is earmarked for African countries and a further 45 billion for Latin America. It is not clear how the projects are selected. Moreover, civil society organizations in Africa and elsewhere criticize the fact that the projects are not focused on the development needs of the partner countries, but on the profit interests of corporations.¹⁴ Even the largest employer association in the EU, BusinessEurope, says greater clarity is needed on the individual projects, the selection criteria, their current status, the funding providers, and the beneficiaries.¹⁵

The Global Gateway is also driving privatization of state services and infrastructure. There is a risk that debt levels,

13 See Andreas Bohne, “Etikettenschwindel ‘Global Gateway’”, *Rosa-Luxemburg-Stiftung*, Kommentar, 18 September 2023, www.rosalux.de/news?tx_news_pi1%5Baction%5D=detail&tx_news_pi1%5Bcontroller%5D=News&tx_news_pi1%5Bnews%5D=51019&tx_news_pi1%5Bnews_uid%5D=0&cHash=c9af296f8ff6fbfb34ebe419ea610536 (last accessed 25 November 2025).
 14 See Eurodad/Counter Balance/Oxfam, “Who Profits from the Global Gateway?”, October 2024, https://assets.nationbuilder.com/eurodad/pages/4589/attachments/original/1728405785/01_EU-GG-report-2024-FINAL.pdf?1728405785 (last accessed 25 November 2025).
 15 BusinessEurope, “Global Gateway — Suggestions and Way Forward”, 22 May 2024, www.besuisseurope.eu/wp-content/uploads/2025/02/2024-05-22_global_gateway_suggestions_and_way_forward_final-64f-1.pdf (last accessed 25 November 2025).

Trade Policy Initiatives to Secure European Access to Raw Materials



Source: PowerShift 2025

PowerShift, “Infoposter: Extract! Extract! Extract! Mehr Rohstoffausbeutung, weniger globale Gerechtigkeit”, 2025, <https://power-shift.de/infoposter-extract-extract-extract> (last accessed 25 November 2025).

which are already very high in the majority of countries in the Global South, will climb further still. Rilli Lappalainen, President of Concord, a European confederation of NGOs working in the area of development policy, summarizes the problems as follows:

“We’re truly shocked that DG INTPA’s vision of international partnerships for the next five years is basically a trade and investment strategy for the EU based on its geopolitical interests. Those interests are defined by competition and the EU’s economic security. Nowhere do we see a concern for the priorities of partner countries, let alone an interest in ensuring that people’s lives are improved.”¹⁶

In summary: Under the guise of development cooperation, the EU’s Global Gateway strategy is opening up new

investment and profit opportunities for European companies, supported by partnership and trade agreements. It is also using money intended to fight poverty in countries of the Global South to serve its own geopolitical and strategic (raw material) interests.

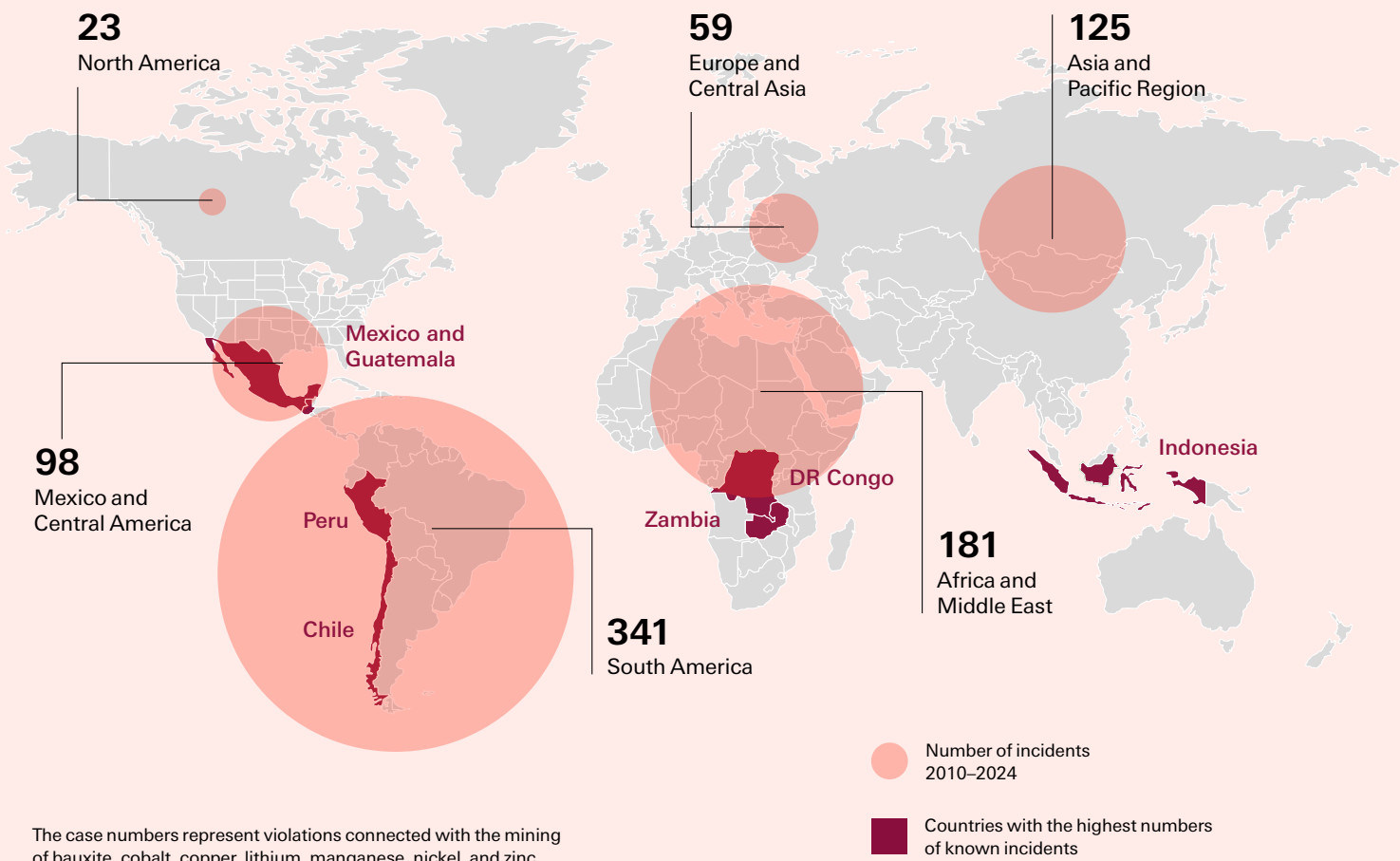
Clean Trade and Investment Partnerships (CTIPs)

CTIPs were initiated by the European Commission in 2025. So far, there have been initial negotiations on “clean trade and investments” with South Africa. Others are set to follow.

CTIPs are part of the Clean Industrial Deal that was presented by European Commission President Ursula von der Leyen in February 2025, and which is intended to make

16 Concord, “A Sell-Out of International Cooperation’: DG INTPA Turns Its Back on Commitments to Put Human Development at the Centre of Its International Cooperation in Leaked Briefing”, 22 April 2024, <https://concordeurope.org/2024/04/22/a-sell-out-of-international-cooperation-dg-intpa-turns-its-back-on-commitments-to-put-human-development-at-the-centre-of-its-international-cooperation-in-leaked-briefing/> (last accessed 25 November 2025).

Environmental Damage and Human Rights Violations by Companies Involved in Mining Minerals for the “Green Transformation”, 2010–2024



Source: Own representation based on Business & Human Rights Resource Centre

Business & Human Rights Resource Centre, “Transition Minerals Tracker: 2024 Analysis”, May 2024, https://media.business-humanrights.org/media/documents/2024_Transition_Minerals_Tracker_EN.pdf (last accessed 25 November 2025).

European industry fit for international competition in the area of clean technologies and support the switch to climate-neutral production.¹⁷ The ongoing CTIP negotiations with South Africa are taking place behind closed doors, so their content is a matter for conjecture. From a European Parliament briefing,¹⁸ it appears that CTIPs are a non-binding instrument under international law, and that they are intended to complement the vast network of EU trade agreements. CTIPs are tailored to the “EU’s and its partners’ concrete business interests”. The partnership with South Africa, in particular, is also accompanied by a Global Gateway investment package worth over 4.7 billion euro.

Here too, initial analyses point to low levels of transparency surrounding the negotiations, and call for the partnerships to focus on the needs of *all* partner countries. In addition, concrete measures should be put in place to involve local stakeholder groups.¹⁹

The Flip Side of Europe’s Raw Material Policy

The trade policy instruments instigated by the EU institutions are turning the global energy transition into a gold mine for private corporations, which safeguard their profits, while the general public — particularly people in the resource-rich countries of Africa, Asia, and Latin America — are saddled with the costs. Countries in South America, but also in Africa, are tailoring the development of new industrial sectors, such as green hydrogen production, at least in part to the needs of Europe, instead of prioritizing the needs of their own populations. Global Gateway projects strengthen this focus and increase the debt levels of countries in the Global South that are already heavily indebted. The revenue shortfall resulting from the ban on levying export taxes and other duties on raw materials further exacerbates the debt spiral. Then there are the costs of renaturing the areas devastated by mining and the growing potential for social conflict.

Where people affected by these policies protest against environmental destruction and the loss of their livelihoods, human rights violations increase. People who stand in the way of mining projects, for instance, often run the risk of being pursued through the courts, kidnapped, or even murdered. Between 2012 and 2023, Global Witness recorded more than 2,100 murders of land and environmental defenders worldwide, most of them in conjunction with mining activities.²⁰ Between 2010 and 2024, 835 human rights violations were recorded in connection with

mineral mining for the energy transition alone, with over 40 percent of these taking place in South America.²¹

Left-wing actors face the challenge of making concrete proposals for what a fair global energy and mobility transition could look like that does not come at the expense of communities and the environment in the resource-rich countries of the Global South, and which values cooperative approaches over private enterprise.

Green, Global, and Fair: Steps on the Path to Social-Ecological Transformation

“Who owns what? Who does what? Who gets what? Who wins and who loses? And whose interests are being served? If we neglect to ask these questions, we will default to a green colonialism that accelerates the current processes of extraction and exploitation in the service of a so-called shared ‘green agenda’.”²²

The following conditions need to be met for a fair global energy and mobility transition:

1. Trade agreements that serve only the interests of Europe and European businesses must be rejected, including the EU-Mercosur Interim Agreement and the EU-Mexico Modernized Global Agreement. Existing agreements should be examined thoroughly.
2. Partnership agreements must promote technology and knowledge transfer and the development of local value creation, and align with the development interests of the partner countries. The ban on export duties and other conditions that restrict the scope for political decision-making by resource-rich countries with regard to their raw materials should be rejected. A step in the right direction here would be to remove chapters on energy and raw materials from trade agreements, and instead allow resource-rich countries to place performance requirements on investors.
3. Investments in the raw material and energy sectors funded through the Global Gateway must meet binding conditions regarding the use of locally produced primary products, recruitment of employees from the partner country, and compliance with the highest environmental and human rights standards. This will also mean strengthening European and German supply chain due diligence legislation, including the possibility of sanctions.

17 European Commission, “Clean Industrial Deal”, https://commission.europa.eu/topics/competitiveness/clean-industrial-deal_en (last accessed 25 November 2025).

18 European Parliament, “Clean Trade and Investment Partnerships”, briefing April 2025, [www.europarl.europa.eu/RegData/etudes/BRIE/2025/769576/EPRS_BRI\(2025\)769576_EN.pdf](http://www.europarl.europa.eu/RegData/etudes/BRIE/2025/769576/EPRS_BRI(2025)769576_EN.pdf) (last accessed 25 November 2025).

19 New Climate Institute, “Shaping Strong EU Partnerships”, December 2024, https://newclimate.org/sites/default/files/2024-12/Shaping%20Strong%20EU%20Partnerships_dec2024.pdf (last accessed 25 November 2025).

20 Global Witness, “Missing Voices. The Violent Erasure of Land and Environmental Defenders”, September 2024, https://gw.hacdn.io/media/documents/Missing_Voices_-_Global_Witness_land_and_environmental_defenders_report.pdf (last accessed 25 November 2025).

21 Business & Human Rights Resource Centre, “Transition Minerals Tracker”, www.business-humanrights.org/en/from-us/transition-minerals-tracker/ (last accessed 25 November 2025).

22 Hamza Hamouchene, “The Energy Transition in North Africa”, Rosa-Luxemburg-Stiftung, 22 June 2023, <https://www.rosalux.de/en/news/id/50586/the-energy-transition-in-north-africa> (last accessed 25 November 2025).

4. Stakeholders must be actively involved both in drawing up partnership agreements and in making decisions on Global Gateway projects. The projects should be carried out in collaboration with local businesses, ideally cooperatives. In general, care must be taken to comply with the highest human rights and environmental standards when carrying out the initiatives designed to implement the Critical Raw Materials Act. In this regard, funded companies should fulfil appropriate reporting obligations.
5. European consumption of raw materials must be slashed to minimize the pressure on sensitive ecosystems and communities in the Global South. Imported/extracted raw materials should not be used primarily for military hardware and the expansion of private transport. Instead, vehicle-sharing concepts should be expanded, and the production of smaller, lighter vehicles should be promoted. Priority should be given to supplying the population and economic sectors that serve the public good, and expanding public infrastructure and energy-efficient housing. At the same time, AK Rohstoffe, an alliance of NGOs campaigning for a fair and democratic global policy for raw materials, is calling for a resource protection law that enshrines the goal of reducing absolute consumption of primary raw materials to eight tonnes per head per year by 2045.²³
6. The circular economy and recycling of raw materials must be strengthened. For this, Germany's National Circular Economy Strategy must be implemented quickly and supplemented with binding implementing measures.²⁴

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²³ AK Rohstoffe, "Rohstoffwende: Ressourcen schützen, Zukunft für alle sichern", October 2024, https://ak-rohstoffe.de/wp-content/uploads/2024/11/2024_AK-Rohstoffe-Forderungen_Ressourcen-schuetzen-Zukunft-fur-alle-sichern.pdf (last accessed 25 November 2025).

²⁴ AK Rohstoffe, "Rohstoffwende".

European Commission, “Study on the Critical Materials for the EU 2023 — Final Report”, 2023, <https://op.europa.eu/en/publication-detail/-/publication/57318397-fdd4-11ed-a05c-01aa75ed71a1> (last accessed 25 November 2025).

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