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The European Union's Strategy for Critical Raw Materials: Ensuring Security and Resilience. The case of EU-Namibia Strategic Partnership

Prof. Gian Paolo Manzella
SUPERVISOR

Prof. Marcella Panucci
CO-SUPERVISOR

Francesca Lidia Barberis
CANDIDATE
ID No. 649002

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LIST OF ABBREVIATION

- ACPS = African, Caribbean and Pacific States
- AEGEI = Africa-EU Green Energy Initiative
- AI = Artificial Intelligence
- AU = African Union
- BRI= Belt and Road Initiative
- CELAC = Community of Latina American and Caribbean States
- CMA = Critical Mineral Agreement
- CMB = Compagnie Maritime Belge
- CNUC = China National Uranium Corporation
- CRM = Critical Raw Mineral
- DG GROWTH = Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs.
- DG INTPA = Directorate-General for International Partnership
- DRC = Democratic Republic of Congo
- EAC = East African Community
- EBA = European Battery Alliance
- EBRD = European Bank for Reconstruction and Development
- EC = European Community
- EDF = European Development Fund
- EEAS = European External Action Service
- EITI = Extractive Industries Transparency Initiative
- EPAs = Economic Partnership Agreements
- ERMA = European Raw Materials Alliance
- ESG = environmental, social and governance standards
- EU = European Union
- FDI = Foreign Direct Investment
- FTAs = Free Trade Agreement
- GDP =Gross Domestic Product
- GGF = Global Gateway Fund
- HDF = Hydrogen de France

- JAES = Joint Africa-EU Strategy
- JOGMEC = Japan Organization for Metals and Energy Security
- MIP = Multi-annual National Indicative Programme
- MoU = Memorandum of Understanding
- OACPS = Organisation of African, Caribbean and Pacific States
- OECD = Organization for Economic and Cooperation Development
- PRC = People Republic of China
- REEs = Rare Earth Elements
- SADC = Southern African Development Community
- SOEs = State-Owned Enterprises
- SSA = Sub-Saharan Africa
- SWAPO = Southwest Africa People's Organisation
- UNDP = United Nations Development Programme

INTRODUCTION

Throughout history, the trajectory of economic growth and human progress has predominantly relied on mankind's utilization of the fundamental natural elements: fire, water, wind, and earth. However, the advent of the steam engine in the nineteenth century, marking the onset of the first industrial revolution, brought about a transformative shift in human progress, characterized not only by novel forms but, more significantly, unprecedented velocity[1].

Termed as the first energy revolution in history, this revolution was underpinned by the combustion of a crucial resource, namely coal. Subsequently, the following century witnessed the emergence of a second industrial revolution, propelled by the internal combustion engine and, consequently, the exploitation of a newfound resource: oil. Yet, discontent with the adverse environmental consequences associated with these technologies, humanity began to embrace novel, more efficient, and environmentally friendly innovations such as wind turbines, solar panels, and electric batteries at the onset of the twenty-first century. This ushered in the third industrial revolution, which extended beyond industrial aspects to encompass an energy revolution as well. Within this evolving landscape, one resource has emerged as particularly indispensable, now commonly referred to as "*the new oil*": rare earth minerals[2].

These minerals have assumed paramount importance as they play a strategic role in producing electric vehicles and batteries, as well as for fostering the digital revolution[3]. Therefore, decarbonization efforts to mitigate climate change, coupled with advancements in artificial intelligence (AI) and the widespread implementation of 5G networks accelerated by the coronavirus pandemic, have set the stage for a race to secure uninterrupted access to the so-called critical raw minerals (CRMs). These minerals, such as cobalt, lithium, platinum, and many others, are becoming increasingly vital in shaping the global economy.

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[1] Pitron, G. (2020, August 4). *The Rare Metals War* (B. Jacobsohn, Trans.).

[2] *Economic Survey 2022-23: Critical minerals and rare earths may well be next oil.* (2023, February 1). The Economic Time News. Retrieved July 6, 2023, from https://economictimes.indiatimes.com/news/economy/policy/economic-survey-2022-23-critical-minerals-and-rare-earths-may-well-be-next-oil/articleshow/97503620.cms

[3] Schwab, K. (2017, January 3). *The Fourth Industrial Revolution*. Currency.

However, despite the pivotal role that raw materials play in the twin transition, this competition is further complicated by its occurrence on a global scale, particularly within an era characterized by geopolitical realignments[4]. Recent significant global events, including the Covid-19 pandemic and Russia's invasion of Ukraine, have compelled policymakers and companies worldwide to reassess their risk mitigation strategies, placing greater emphasis on diversification and resilience within global value chains.

As the geopolitical landscape rapidly evolves, there is a growing consensus that relying solely on the free market is insufficient to effectively address the simultaneous convergence of the aforementioned global trends and the resurgence of competition for CRMs[5]. Consequently, nations and industries are increasingly concerned about the potential ramifications of resource scarcity resulting from disruptions in supply flows or political rivalries. This realization underscores the need to prioritize supply security, particularly in light of the rise of the People's Republic of China (PRC) and initiatives such as the Belt and Road Initiative (BRI), which have ushered in a geopolitical shift.

Indeed, China's expanding influence on the global stage has elevated critical minerals from mere industrial inputs to materials of strategic and economic significance. Notably, China's near monopoly on these critical minerals and its potential to utilize it as a strategic lever, have been exemplified by past actions, such as export restrictions[6]. This behaviour was recently further highlighted by the Organization for Economic Cooperation and Development (OECD), which pointed out that Beijing is at the forefront of expanding export constraints on critical minerals that limit availability and drive up the price of raw materials

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[4] Coles, I. (2019, June 21). *Strategic minerals — the new global battleground*. Financial Times. Retrieved July 11, 2023, from https://www.ft.com/content/c553bfc0-890b-11e9-a028-86cea8523dc2

[5] Marchionna, G., & Prina Cerai, A. (2020, November 5). *Terre Rare Sempre più Strategiche*. ISPI Online. Retrieved July 6, 2023, from https://www.ispionline.it/it/pubblicazione/terre-rare-sempre-piu-strategiche-28154

[6] For more information see also Mancheri, N. A. (2015, December). *World trade in rare earths, Chinese export restrictions, and implications*. Resources Policy, *46*, 262–271. https://doi.org/10.1016/j.resourpol.2015.10.009; and Mancheri, N.A. (2016, September). *An Overview of Chinese Rare Earth Export Restrictions and Implications*. In Rare Earths Industry (1st ed., pp. 21–36). Elsevier. https://doi.org/10.1016/B978-0-12-802328-0.00002-4

needed for a green energy transition[7].

The European Union (EU) has positioned itself at the forefront of the green and digital transition, embarking on ambitious initiatives outlined in the EU Green Deal and the Net Zero Industry Act. Within the European Union, the metallic minerals sector encompasses a diverse range of ores containing valuable elements such as chromium, copper, lead, silver, and zinc[8]. However, despite this variety, the majority of minerals utilized by the European metallic industry are imported. Operational mines within the EU are relatively limited, with countries such as Austria, Finland, Greece, Ireland, Poland, Portugal, and Sweden accounting for slightly more of the 1% of global production for specific metallic minerals[9]. These figures highlight that the EU, despite efforts to reopen and revitalize old mines, is not a resource-rich continent[10]. As a consequence, it heavily relies on international markets for Critical Raw Materials, further compounded by its limited domestic production and processing capacity.

Import reliance characterizes the EU's supply chains, with over 95% of 15 designated CRMs and over 60% of an additional seven CRMs being sourced from

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[7] Dempsey, H. (2023, April 11). *China leads rise in export restrictions on critical minerals, OECD says*. Financial Times. Retrieved July 6, 2023, from https://www.ft.com/content/198b6824-21d6-4633-9a97-00164d23c13f

[8] For more information see also Zimmerman, A, & Aarup, S. A. (2023, March 9). *The critical raw materials you need to know*. Politico. Retrieved July 11, 2023, from https://www.politico.eu/article/critical-raw-materials-act-europe-guide/#borates

[9] European Commission. (n.d.). *Metalllic Minerals*. European Commission. Retrieved July 11, 2023, from https://single-market-economy.ec.europa.eu/sectors/raw-materials/related-industries/minerals-and-non-energy-extractive-industries/metallic-minerals_en

[10] For more information see also Dempsey, H. (2023, June 29). *French miner Imerys to help develop UK's largest lithium deposit*. Financial Times. Retrieved July 7, 2023, from https://www.ft.com/content/771a51f5-1e9e-4f10-8e8d-863112844ff4; and Fleming, S. (2023, January 12). *Sweden discovers biggest rare earths deposit in EU*. Financial Times. Retrieved July 7, 2023, from https://www.ft.com/content/78706a10-7ea6-445e-835c-ad8dd51b6a34

external suppliers[11]. Notably, China plays a prominent role as the most significant supplier, accounting for 62% of the EU's total imports. Other key suppliers include the United States, Russia, Brazil, and Nigeria.

This heavy dependence on imports exposes the EU's access to CRMs to vulnerabilities stemming from geopolitical and market risks. Therefore, there is a pressing need for the European Union to prioritize diversification, resilience, and strategic resource management to safeguard the stability and security of CRM supply chains within Europe. This entails exploring strategies to enhance domestic production capabilities, strengthen processing capacities, and forge partnerships to establish alternative sources of CRMs. Addressing these challenges is crucial for mitigating the risks associated with the EU's heavy import dependence, which is essential for supporting the objectives of the green and digital transition.

Therefore, this thesis delves into the multifaceted landscape of EU raw materials diplomacy, exploring its historical trajectory, evolving strategies, and dynamics. It aims at investigating the "diplomatic" angle of the EU's critical raw material strategy by specifical referring to the EU-Namibia Partnership on critical raw materials and renewable hydrogen as a case study of ensuring a secure and resilient supply chain.

The first chapter meticulously traces the EU's approach to raw materials, unveiling diplomacy as a pivotal instrument for EU action in this domain. From the inaugural Raw Materials Initiative in 2008 to the contemporary Critical Raw Materials Act of March 2023, the chapter underscores the EU's commitment to fostering international collaborations and dialogues. This emphasis on partnerships over conventional trade agreements and development pacts marks a distinctive facet of the EU's raw materials approach.

In the second chapter, the intricate interplay between raw materials diplomacy and the Global Gateway initiative comes into focus. This inquiry navigates through EU endeavours, encompassing trade accords, developmental strategies, and infrastructure undertakings on a global scale, with a particular focus

[11] Theodosopoulos, V. (2020, July). *The Geopolitics of Supply: towards a new EU approach to the security of supply of critical raw materials?* Institute for European Studies - Brussels School of Governance, 2020/5, from https://brussels-school.be/sites/default/files/IES-PB-The-Geopolitics-of-Supply_0.pdf

on Africa. It elucidates the EU's role in cementing resilient raw material supply chains and advancing sustainable development, culminating in the transformative Global Gateway plan. This paradigm shift emphasizes strategic investments in critical sectors while retaining the significance of raw materials supply. This chapter also lays the foundation for the ensuing examination of the pivotal Memorandum of Understanding (MoU) signed with Namibia in November 2022.

The concluding chapter serves as an encapsulation of Namibia's resource landscape and proceeds to explore the intricacies of the MoU between the EU and Namibia, an outcome of the COP27 conference and the EU's Critical Raw Materials strategy. By amalgamating insights from interviews with policymakers, diplomatic personnel, and stakeholders, this chapter aspires to offer a comprehensive perspective of the EU's raw materials strategy. Therefore, it analyses the concrete case study to delineate successes, areas for improvement, and pathways forward.

The thesis conclusion harmonizes the research findings, accentuating the lessons extracted from the Namibia case study. It encompasses an evaluation of the Global Gateway's role as a robust instrument for EU-Africa relations, specifically within the realm of raw materials diplomacy. This comprehensive exploration underscores the EU's commitment to fostering sustainable partnerships, ensuring raw materials security, and navigating the nuanced landscape of global diplomacy.

CHAPTER 1:

RAW MATERIALS AND EUROPE: THE IMPORTANCE OF MINERAL DIPLOMACY

1.1 THE ORIGIN OF THE RAW MATERIALS DIPLOMACY

1.1.1 From the Treaty of Paris to the First Steps in the Area of External Relations and Partnerships with Third Countries

The issue of raw materials is intrinsically linked to the birth and development of the European Community (EC). The signing of the 1951 Treaty of Paris, establishing the European Coal and Steel Community, was centered around two raw materials, coal and steel, recognized as strategically important at the time[12].

After that initial moment, however, the issue has intermittently remained on the European agenda, gaining some attention only through key policy documents and interventions. Starting from the Memorandum of 1967 that marked a first milestone of European Industrial Policy, and also recognized the critical state of the mining sector, addressing raw materials as part of its overall agenda[13].

Subsequently, the Colonna di Paliano Memorandum of 1970 emerged as the most ambitious industrial policy act adopted by the Commission at that time, aiming to secure the supply of raw materials to the industrial sector[14].

The centrality of the raw materials issue was further emphasized by Spinelli, who, as the Commissioner for Industry, presented the Commission's first official

[12] European Coal and Steel Community. (1951, April 18). *Treaty establishing the European Coal and Steel Community*. In European Commission. Retrieved September 19, 2023, from https://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:11951K:EN:PDF

[13] Communaute Economique Europeenne Commission. (1967, July 4). *Memorandum sur la politique industrielle de la Communaute.* In Archive of European Integration. Retrieved July 11, 2023, from http://aei.pitt.edu/5197/1/5197.pdf

[14] Commission of the European Communities. (1970, March 18). *The Community's industrial policy Commission Memorandum to the Council.* In Archive of European Integration. Retrieved July 11, 2023, from http://aei.pitt.edu/5598/1/5598.pdf

intervention on the subject in 1975. His intervention already highlighted the dependence of European industry on raw materials and anticipated the need for Community action, emphasizing the importance of promoting the European mineral industry and addressing the strong position of certain countries. Furthermore, as a true forerunner of themes that find fertile ground only in recent times, the Communication underlined the necessity of diversifying sources of supply and introduced the idea of what today should be known as "circular economy"[15].

Therefore, the issue of international relations linked to raw materials was of immediate importance to the European community.

However, despite these declarations of intent, the Community action in the field often lacked concrete efforts. The promotion of a Community strategy encountered resistance from Member States, leading to a lack of substantial progress. And if any step forward was made in these years, it was in the area of external relations and partnerships with third countries. As an example of this, in 1978, the European Investment Bank approved the financing of mineral projects in developing countries. In 1984 agreements were established with the United States to facilitate the exchange of information on the mining industry.

These initiatives demonstrate the evolving nature of the European Union's approach to the raw materials issue, with attempts to foster cooperation and collaboration beyond national boundaries. So, while challenges remained particularly in translating declarations into concrete actions, progress was made in forging partnerships and pursuing external relations in the realm of raw materials[16]. A significant shift only occurred at the beginning of the following century.

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[15] Commission of the European Communities. (1975, February 5). *The Community's Supplies of Raw Materials.* In Archieve of European Integration. Retrieved July 11, 2023, from http://aei.pitt.edu/51762/1/A10574.pdf

[16] Biedermann, R. (2016, February 1). *The European Union's Raw Materials Diplomacy: Market Access and Development?* European Foreign Affairs Review, 21 (Issue 1), 115–134. https://doi.org/10.54648/eerr2016008

1.1.2 A Turning Point in EU's Raw Materials Diplomacy: From the 2008 Raw Materials Initiative to the first official list of "Critical Raw Materials"

As a matter of fact, the real turning point, was in 2008, when the Raw Materials Initiative was launched under a changing international context[17]. This initiative aimed to reduce Europe's dependence on non-energy and non-agricultural raw materials, addressing the rising prices observed since 2004, and recognizing the geopolitical risks associated with critical materials supply[18]. It presented a three-pillar strategy.

The first one aimed to provide Member States with unrestricted access to raw resources on global markets. The second attempted to create framework conditions to maximize supply of raw materials from within the EU while adhering to sustainability criteria. The third pillar sought to promote effective recycling practices as a means to reduce reliance on primary raw materials. Furthermore, the 2008 economic crisis, as well as commodity price volatility and China's export limitations, introduced new elements to the strategy, necessitating further consideration[19].

Notably, the first pillar encompassed various policy areas such as international cooperation, trade and regulatory policies, and development policy[20]. This foundation laid the groundwork for the establishment of a proper "Raw Materials Diplomacy" within the European Union, which aimed to engage in communication with key third countries and raise the raw materials issue in relevant trade and other forums[21].

In line with the three pillars of the 2008 Communication, the Initiative

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[17] Commission of the European Communities. (2008, November 4). *Communication from the Commission to the European Parliament and the Council. The raw materials initiative — meeting our critical needs for growth and jobs in Europe.* Retrieved July 11, 2023, from https://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2008:0699:FIN:en:PDF

[18] Manzella, G.P & Gallo, A.B. (2023, June). *Le 'materie prime critiche' tra Unione Europea e ordinamento interno Storia, questioni aperte, prospettive*. Rivista Giuridica Del Mezzogiorno, n. 2.

[19] Commission of the European Communities. (2008, November 4), *supra* 17.

[20] Küblböck, K. (2013, September). *The EU Raw Materials Initiative: Scope and critical assessment.* ECONSTOR, No. 8.

[21] Biedermann, R. (2016, February 1), *supra* 16.

continued to develop in 2011. In relation to the raw materials diplomacy pillar, it was recognized that greater attention should be given to European investments, especially in Africa[22]. Hence, the focus should be on providing institutional support in terms of governance and transparency, as well as promoting inclusive growth.

This approach aimed to support investments through institutional initiatives that enhance governance and transparency, such as the Extractive Industries Transparency Initiative (EITI), which strives to increase the openness and sustainability of mining payments while also sharing best practices with international organizations such as the World Bank and the OECD[23]. The EITI is a global partnership of governments, businesses, and civil society organizations working together to make natural resource income management more open and accountable.

Furthermore, in 2011, the Commission published the inaugural list of "critical" raw materials, which was the result of an extensive effort carried out by a dedicated working group. This list identified 14 minerals deemed strategically important to the EU, taking into account factors such as economic importance, supply risks associated with the political and economic stability of supplying countries, and environmental risks[24].

Therefore, the EU has emerged as a key player in raw materials diplomacy, but most importantly it has acknowledged the importance of taking strategic measures to ensure their availability, sustainability, and security. This leads to a comprehensive approach of the issue that includes bilateral, regional and

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[22] For more information see also Council of the European Union. (2010, December 14). *Joint Africa EU Strategy Action Plan 2011-2013.* In Archive of European Integration. Retrieved July 11, 2023, from http://aei.pitt.edu/45282/1/action_plan_2011-2013.pdf

[23] Haufler, V. (2010, August 1). *Disclosure as governance: The extractive industries transparency initiative and resource management in the developing world.* Global Environmental Politics, no. 10. https://doi.org/10.1162/GLEP_a_00014

[24] European Commission. (2011, February 2). *Communication from the commission to the European Parliament, the Council, the European Economic and Social Committee and the committee of the regions tackling the challenges in commodity markets and on raw materials.* Retrieved July 11, 2023, from https://www.europarl.europa.eu/meetdocs/2009_2014/documents/com/com_com(2011)0025_/com_com(2011)0025_en.pdf

multilateral approaches[25].

As a matter of fact, the Strategic Implementation Plan for the European Innovation Partnership on Raw Materials of 2013, is an example of this, where the EU promotes partnerships, policy dialogues, and research cooperation with developing countries and resource-rich nations, fostering global raw materials governance[26].

These efforts reflect the EU's commitment to address raw materials issues through various routes[27]. Especially notable are the initiatives undertaken between 2011 and 2013, which involved the signing of numerous "letters of intent" between the European Union and third countries. These letters aimed to foster the development and enhancement of political dialogues and cooperation in the mining and critical raw materials sector. Notably, countries in Latin America, including Argentina[28], Chile[29], Uruguay[30], Colombia[31], and Mexico[32], were part of

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[25] Küblböck, K. *supra* 20.

[26] European Commission. (2013, September 18). *Strategic Implementation Plan for the European Innovation Partnership on Raw Materials*. Retrieved July 20, 2023, from https://single-market-economy.ec.europa.eu/sectors/raw-materials/eip/strategic-implementation-plan-sip_en

[27] Biedermann, R. (2016) *supra* 15.

[28] European Commission. (2011). *Europe and Argentina recognized the importance challenges on global industrial raw materials markets*. In European Commission. Retrieved August 19, 2023, from https://ec.europa.eu/docsroom/documents/13436/attachments/3/translations

[29] European Commission. (2013, January 24). *Mission for Growth: Antonio Tajani, fostering economic ties between Chile and the EU*. In European Commission. Retrieved August 19, 2023, from https://ec.europa.eu/commission/presscorner/detail/en/MEMO_13_26

[30] European Commission. (2011). *Letter of intent on a policy dialogue on raw materials between between Mr. Antonio Taj ani, Vice-President of the European Commission and Mr. Roberto Kreimerman, Minister of Industry, Energy and Mining of the Republic of Uruguay*. In European Commission. Retrieved August 19, 2023, from https://ec.europa.eu/docsroom/documents/8606/attachments/1/translations

[31] European Commission. (2012, May 16). *Antonio Tajani: Enhancing business cooperation between SMEs in Colombia and the EU*. In European Commission. Retrieved August 19, 2023, from https://ec.europa.eu/commission/presscorner/detail/en/MEMO_12_349

[32] European Commission. (2012, May 14). *Antonio Tajani: Fostering economic ties with Mexico*. In *European Commission*. Retrieved August 19, 2023, from https://ec.europa.eu/commission/presscorner/detail/en/MEMO_12_326

these engagements. Additionally, countries such as Morocco[33], Tunisia[34], Egypt[35], and Greenland[36] also participated in this collaborative effort.

These commitments were characterized by pledges to intensify existing exchanges of views and dialogues on these issues. A shared understanding emerged that the competitiveness of these sectors plays a pivotal role in reducing industrial vulnerability by ensuring a more secure supply of these critical materials.

1.1.3 The Evolution of the EU Raw Materials Diplomacy: From Trade Rules to Circular Economy Strategies

A further development took place in 2014, when the Initiative have been advocating for trade rules on export restrictions of raw materials, including bans, quotas, duties, and non-automatic export licenses, in bilateral and multilateral negotiations such as Free Trade Agreements (FTAs) or Economic Partnership Agreements (EPAs) with third countries[37]. Consequently, the Commission actively

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[33] European Commission. (2012). *Lettre d'intention relative au renforcement du dialogue politique sur les matières premières entre la Royame du Maroc et l'Union Européenne*. In European Commission. Retrieved August 21, 2023, from https://single-market-economy.ec.europa.eu/sectors/raw-materials/areas-specific-interest/raw-materials-diplomacy_en#:~:text=In%20the%20EU%20Raw%20Materials,cooperation%20bilaterally%2C%20regionally%20or%20multilaterally.

[34] European Commission. (2012). *Lettre d'intention relative au renforcement du dialogue politique sur les matieres premieres entre l'Union européenne et la République Tunisienne.* In European Commission. Retrieved August 21, 2023, from https://single-market-economy.ec.europa.eu/sectors/raw-materials/areas-specific-interest/raw-materials-diplomacy_en#:~:text=In%20the%20EU%20Raw%20Materials,cooperation%20bilaterally%2C%20regionally%20or%20multilaterally.

[35] European Commission. (2012, November 13). *Mission for Growth: Seizing mutual benefit for businesses in the EU and Egypt.* In European Commission. Retrieved August 19, 2023, from https://ec.europa.eu/commission/presscorner/detail/en/MEMO_12_856

[36] European Commission. (2012, June 8). *Commission decision on the signature of a Letter of Intent between the European Union and Greenland on co-operation in the area of mineral resources*. In European Commission. Retrieved August 19, 2023, from https://ec.europa.eu/docsroom/documents/11524/attachments/1/translations

[37] European Commission. (2014, May 26). *Commission staff working document. On the implementation of the Raw Materials Initiative*. Retrieved July 11, 2023, from https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52014SC0171

addressed the raw materials issue through bilateral workshops and dialogues with Greenland, African, and Latin American countries, and promoted the topic within the OECD[38]. This ensured that raw materials became an integral part of EU development policy. Furthermore, for the first time the Commission summarized the outcome of trade negotiations on raw materials, and published a second list in which the number of identified critical raw materials rise to 20, underlying the ever-increasing importance of the issue[39]. Most importantly, the Commission started to use the list in negotiations on trade agreements, challenging trade-distorting measures, carrying out research and innovation action[40]. Furthermore, critical raw materials became a priority area of the EU action plan for the circular economy published in 2015[41].

Then, in 2017, the list increased again to 27 critical minerals, underlining its importance and use by the Commission in a manner closely linked to the development of industrial policy in identifying investment needed to reduce Europe's dependence on imported raw materials; targeting support for innovation in the raw materials supply sector, within the framework of Horizon 2020 programme; and in drawing attention to the importance of raw materials for the transition to a low-carbon, resource-efficient economy characterised by greater circularity[42].

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[38] For more information see also the EU-Greenland Workshop on Raw Materials held in Brussels on June 19, 2015; and the EU-Africa Union joint session on infrastructure for the minerals sector held in Brussels on 19-20 March 2015.

[39] European Commission. (2014, May 26). *Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions. On the review of the list of critical raw materials for the EU and the implementation of the Raw Materials Initiative.* Retrieved July 11, 2023, from https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52014DC0297

[40] Manzella, G.P & Gallo, B.A (2023) *supra* 18

[41] European Commission. (2015, December 2). *Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions. Closing the loop - An EU action plan for the Circular Economy*. Retrieved July 11, 2023, from https://eur-lex.europa.eu/resource.html?uri=cellar:8a8ef5e8-99a0-11e5-b3b7-01aa75ed71a1.0012.02/DOC_1&format=PDF

[42] Manzella, G.P, & Gallo, B.A (2023) *supra* 18

1.2. MINERAL DIPLOMACY IN EU INDUSTRIAL POLICY ACTION PLAN 2020

1.2.1 A Renewed Race for Minerals: The 2020 European Industrial Plan Facing Challenges and Opportunities

While the evolution of the EU Raw Materials Strategy showcases the continuous effort to address the challenges and opportunities related to raw materials, ensuring the security of supply, and promoting sustainability, the issue was going to change in the 2020. As a matter of fact, the publication of the fourth list of critical raw materials in 2020, and a first list of "strategic" minerals, marked a significant moment in the history of European industrial policy. It coincided with a period where Community action took on a more comprehensive and strategic perspective, placing the issue of raw material access within a broader context. This shift was driven by various factors, including the global acceleration of industrialization and the European Union's commitment to the Green Deal, which recognized the strategic importance of raw material supply for achieving environmental objectives. In this context, the COVID-19 pandemic further highlighted the urgency of industrial revitalization and the importance of the green transition.

As a result, in September 2020, the Commission published a Communication on the resilience of critical raw materials, which highlighted the coexistence of security and sustainability, identified future development trends, and analysed critical points in the value chain[43].

The prominence of certain countries in the supply of specific critical minerals, such as China in rare earth elements, Chile and Australia in lithium, and the Democratic Republic of Congo (DRC) in cobalt, underscores the dominant positions they hold in the global market. Alongside this, the European Union exhibits limitations in its capacity for extraction, processing, recycling, refining, and separation of critical minerals like lithium and rare earths, resulting in a

[43] European Commission. (2020, September 3). *Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions. Critical Raw Materials Resilience: Charting a Path towards greater Security and Sustainability.* Retrieved July 11, 2023, from https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52020DC0474&from=EN

considerable dependence on imports from other regions. Notably, some minerals mined within Europe are exported for processing, indicating vulnerabilities in the value chain[44]. These deficiencies pose challenges to various industrial sectors, necessitating a more strategic and comprehensive approach, particularly considering the increasing demand for these minerals in sectors such as green transition, digital technology, and defence.

To address the aforementioned challenges posed by raw material supply, the Communication also updated the list of critical raw materials, expanded from 27 to 30, demonstrating a closer link with industrial policy principles. Most importantly, though, it introduces an Action Plan consisting of four pillars:

(i) develop resilient value chains for EU industrial ecosystems,
(ii) reduce dependency on primary critical raw materials through circular use of resources, sustainable products and innovation,
(iii) strengthen the sustainable and responsible domestic sourcing and processing in the European Union,
(iv) diversify supply with sustainable and responsible sourcing from third countries[45].

1.2.2 EU's Strategic International Partnerships for Critical Raw Materials: Enhancing Resilience and Sustainable Development

In line with its fourth pillar, the European Union has taken significant steps to forge strategic international partnerships with third countries, with the primary aim of enhancing the resilience and diversification of critical raw material supply chains.

The first significative partnership of this kind that has ever been signed was the EU-Canada Strategic Partnership on Raw Materials, in 2021[46]. This partnership

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[44] Tidey, A. (2022, April 14). *Lithium could help end the EU's oil addiction. But does Europe have enough of it?* Euronews. Retrieved July 11, 2023, from https://www.euronews.com/my-europe/2022/04/14/lithium-could-help-end-the-eu-s-oil-addiction-but-does-europe-have-enough-of-it

[45] European Commission. (2020, September 3) *supra* 43

[46] European Commission. (2021, June 21). *EU and Canada set up a strategic partnership on raw materials.* Retrieved July 20, 2023, from https://single-market-

reflects a new era of international minerals collaboration, driven by shared values and the recognition of Canada as a resource-rich country that aligns with the EU's commitment to environmental, social, and governance principles. Moreover, building on the already existing Comprehensive Economic and Trade Agreement (CETA) between the EU and Canada, the strategic partnership aims to advance trade and investments into a secure, sustainable, and resilient raw materials value chain[47]. This is deemed essential for achieving the ambitious goals of climate-neutrality and digitalization in the transitioning economies. This agreement also emphasizes on the integration of EU-Canada raw material value chains while specifically enhancing collaboration on science, technology and innovation collaboration; as well as environmental, social, and governance (ESG) criteria and standards.

Following the success of the EU-Canada agreement, the EU further strengthened its strategic collaboration by signing, on July 2021, a Memorandum of Understanding (MoU) on a Strategic Partnership on Critical Raw Materials and Batteries with Ukraine, marking another significant milestone[48]. The partnership with Ukraine focuses on activities encompassing primary and secondary critical raw materials and batteries throughout the entire value chain. Particularly, the plan underlines policy and regulatory framework alignment, sustainable development of mineral resources, and research collaboration under Horizon 2020. Concrete joint actions outlined in the roadmap include the development of a low-carbon strategy, enhanced data management, and promotion of joint-venture projects, with technical assistance and financial support from the EU and European banks.

Furthermore, during COP27 held in Egypt in 2022, the EU made significant progress in establishing partnerships with Kazakhstan and Namibia. These partnerships aim to ensure secure and sustainable supply chains of raw materials,

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economy.ec.europa.eu/news/eu-and-canada-set-strategic-partnership-raw-materials-2021-06-21_en.

[47] European Commission. (2022, September 21). *CETA turns 5: a privileged partnership for sustainable growth and secure supplies.* Retrieved July 20, 2023, from https://ec.europa.eu/commission/presscorner/detail/en/IP_22_5654

[48] European Commission. (2021, July 13). *EU and Ukraine kick-start strategic partnership on raw materials.* Retrieved July 20, 2023, from https://single-market-economy.ec.europa.eu/news/eu-and-ukraine-kick-start-strategic-partnership-raw-materials-2021-07-13_en

refined materials, and renewable hydrogen, thus catalysing green and digital transformations in both partner countries.

The EU-Kazakhstan partnership focuses on three areas of collaboration that includes the promotion of a closer integration in raw materials, batteries, and renewable hydrogen value chains; the strengthening of the supply chain resilience through transparency and information sharing; and the creation of bilateral cooperation in capacity-building, skills development, and research & innovation. Both parties have committed to developing a detailed roadmap for 2023-2024 to drive mutually beneficial cooperation, promoting economic growth and sustainable development.[49].

Similarly, the strategic partnership with Namibia seeks to ensure secure and sustainable raw material supply chains while promoting the green and digital transformation of the two economies This partnership emerged from discussions held during the EU-Africa Summit in February 2022, where President von der Leyen and Namibian President Hage Geingob explored the establishment of a partnership on sustainable raw materials value chains and renewable hydrogen[50]. Given its significance in the broader context of the EU's Global Gateway strategy, the partnership's specific objectives and implementation will be further explored in a dedicated chapter of the thesis.

1.2.3 Promoting Raw Materials Diplomacy: From Bilateral Strategic Partnership to International Alliance

Overall, the EU's proactive engagement in strategic international partnerships underscores its commitment to addressing raw materials challenges through a comprehensive approach, encompassing bilateral, regional, and multilateral efforts. The above-mentioned initiatives foster collaboration, promote sustainable practices, and establish secure and resilient raw material supply chains, thus reinforcing the EU's leadership role in raw materials diplomacy.

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[49] European Commission. (2022, November 7). *COP27: European Union concludes a strategic partnership with Kazakhstan on raw materials, batteries and renewable hydrogen*. Retrieved July 20, 2023, from https://ec.europa.eu/commission/presscorner/detail/en/IP_22_6585

[50] European Commission. (2022, November 8). *COP27: European Union concludes a strategic partnership with Namibia on sustainable raw materials and renewable hydrogen*. Retrieved July 20, 2023, from https://ec.europa.eu/commission/presscorner/detail/en/ip_22_6683

However, a further effort on the part of the European Union in promoting raw materials diplomacy is being made with the promotion of various initiatives such as the European Battery Alliance (EBA) and the European Raw Materials Alliance (ERMA). Both provide a platform to better integrate critical raw materials and battery value chains to develop mineral resources, as well as to address the challenges of raw material sourcing, processing and recycling. While they seek to achieve these goals by promoting, respectively, a stronger battery and minerals industry, involving various stakeholders, companies, research institutes and civil society within EU, they also seek to promote an international partnership.

The EBA serves as a platform to promote international collaborations and partnerships in the battery sector. This includes engagement with other countries and regions to promote cooperation in battery research, development and trade. By strengthening international partnerships, the EU aims to create a global network for sustainable battery technologies[51].

ERMA aims to promote cooperation with resource-rich countries outside the EU by supporting partners that source responsibly, promoting fair trade and engaging in dialogue and cooperation with major raw material producers and exporters[52]. Currently, companies from countries like South Africa, Namibia, Cameroon, Rwanda or Brazil (just to mention a few) are member of the ERMA network.

In summary, the issue of raw materials retains its paramount importance in the aftermath of the Industrial Action Plan's publication. Furthermore, its significance has been further amplified by the geopolitical turbulence triggered by the crisis in Ukraine. These external developments have magnified the relevance and urgency of addressing raw materials challenges within the broader context of industrial and geopolitical considerations.

[51] For more information see also *Building a European battery industry - European Battery Alliance*. (2023, August 23). European Battery Alliance. https://www.eba250.com/

[52] For more information see also *European Raw Materials Alliance*. (2023, May 26). European Raw Materials Alliance. https://erma.eu/

1.3. DIPLOMACY IN THE EUROPEAN CRITICAL RAW MATERIALS ACT 2023

1.3.1 The European Critical Raw Material Act: A Landmark in Addressing Raw Material Challenges

These were some of the elements that set the stage for the biggest breakthrough in the field: the European Critical Raw Material Act. It was presented in March 2023, marking a qualitative step forward in addressing the challenges and opportunities of related to the issue[53].

There are several reasons why this act is so important. First and foremost, the choice of regulatory instrument marks a significant change of pace compared to what has been done so far, which, as we have seen, has often been characterised in the past by good intentions but few actions, or generic initiatives.

Then, a further increase in the number of items on the list, as well as the identification of a sub-category of "highly strategic" materials, are also indicators of the growing importance given to the topic by policymakers and industry stakeholders. Moreover, the Commission's proposal itself is also characterised by greater determination on the fundamental pillars of the earlier 2008 initiative. Indeed, it emphasizes the importance of value chain development, promoting sustainable sourcing, and diversifying supply sources for critical raw materials. By focusing on these pillars, the EU seeks to strengthen its industrial base and enhance its competitiveness in critical sectors that heavily rely on these materials. The Critical Raw Materials Act also improves the EU capacity to monitor and mitigate risks of disruptions and enhances circularity and sustainability.

The Regulation introduces specific targets for the Union's domestic capacities in the strategic raw material supply chain by 2030. These targets include

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[53] European Commission. (2023, March 16). *Proposal for a regulation of the European Parliament and of the Council establishing a framework for ensuring a secure and sustainable supply of critical raw materials and amending Regulations (EU) 168/2013, (EU) 2018/858, 2018/1724 and (EU) 2019/1020.* Retrieved July 11, 2023, from https://eur-lex.europa.eu/resource.html?uri=cellar:903d35cc-c4a2-11ed-a05c-01aa75ed71a1.0001.02/DOC_1&format=PDF

having extraction capacity capable of meeting at least 10% of the annual consumption of strategic raw materials, processing capacity that can produce at least 40% of the annual consumption, and recycling capacity that can produce at least 15% of the annual consumption. Furthermore, the Union aims to diversify its imports of strategic raw materials by ensuring that each material can rely on imports from multiple third countries, with no single country providing more than 65% of the Union's annual consumption[54].

1.3.2 Strengthening Strategic Partnerships for Sustainable Raw Materials Management: EU's Mineral Diplomacy in the CRM Act

Particularly referring to this last point, under article 33 of the above-mentioned Regulation there are specific elements related to a "Mineral Diplomacy".

As a matter of fact, the EU is strongly committed to establish strategic partnerships improving the Union's security supply and addressing the challenges presented by rising global demand. These partnerships aim at improving cooperation along the entire value chain, seeking to build a "win-win partnership" with resource-rich countries that is beneficial for both the EU and the partner country[55].

This includes the selection of "strategic projects" for raw materials mining, processing, or recycling in Europe and foreign countries that will benefit from streamlined permitting processes and easier government financed under EU state aid rules. The intention is to propose something innovative – a new partnership that is not just about seeking to have access to the materials, then "extract and leave," but to ensure there is "local value addition" to mining activity for host countries.

Notably, the EU is in the final stages of updating its 2003 trade agreement with Chile, by including a new chapter on energy and raw materials, and it aims to finalize a separate strategic partnership on raw materials which has the potential to

[54] Ibid.

[55] Simon, F. (2023, May 31). *EU pushes alternative model to China in global race for raw materials.* Euractiv. Retrieved July 23, 2023, from https://www.euractiv.com/section/circular-economy/news/eu-pushes-alternative-model-to-china-in-global-race-for-raw-materials/

open the door for deeper cooperation in the mineral field[56]. Similarly, Argentina, has emerged as another key partner, as witnessed by the signing of a Memorandum of Understanding between the President von der Leyen and the President of Argentina, Alberto Fernández in June 2023[57]. This Memorandum establishes a partnership between the EU and Argentina on sustainable value chains for raw materials, particularly targeting lithium and copper.

At the EU-CELAC Summit held in Brussels in July 2023, both the agreements have been the object of further discussions. EU leaders and representatives from the Community of Latin American and Caribbean States (CELAC) expressed their commitment to renewing their long-standing partnership, with a keen eye on the potential contributions of the EU-LAC global gateway investment agenda. This agenda seeks to address investment gaps and mobilize funding for crucial areas, creating a platform for enhanced cooperation.

Furthermore, alongside the first-ever Kinshasa Economic Forum held on March 2023, the EU Commission has announced an initial investment in the Democratic Republic of Congo's critical minerals sector and infrastructure projects[58]. Subsequently, the Commissioner for internal market, Thierry Bretton, has confirmed that the negotiations of a Memorandum of Understanding with the DRC on sustainable critical raw materials value chains is currently undergoing. Once agreed upon, this partnership holds the potential to foster sustainable development in the country, including improving environmental, social, and governance standards in its mining sector. Additionally, it addresses the EU's reliance on the DRC as a major global producer of cobalt and copper, ensuring the security of supply.

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[56] European Commission. (2023, July 5). *Commission presents EU-Chile agreement to Council for signature authorisation*. In European Commission. Retrieved July 23, 2023, from https://ec.europa.eu/commission/presscorner/detail/en/ip_23_3682

[57] European Commission. (2023, June 13). *Global Gateway: EU and Argentina step up cooperation on raw materials*. In European Commission. Retrieved July 23, 2023, from https://ec.europa.eu/commission/presscorner/detail/en/ip_23_3217

[58] Komminoth, L. (2023, March 6). *EU pledges €50m investment in DRC infrastructure and minerals*. African Business. Retrieved July 23, 2023, from https://african.business/2023/03/trade-investment/eu-pledges-e50m-investment-in-drc-infrastructure-and-minerals.

Another significant announcement came from Commissioner for International Partnerships, Jutta Urpilainen, who revealed the intention of the EU and Zambia to initiate negotiations for a Memorandum of Understanding on a strategic partnership focused on sustainable critical raw materials value chains[59].

Additionally, in June 2023, the European Commission formulated its negotiation directives for a Critical Minerals Agreement (CMA) with the United States[60]. The primary objective is to bolster supply chains within the EU and the United States for essential raw materials crucial in the manufacturing of electric vehicle batteries. By successfully concluding an EU-US CMA, the EU aims to secure a status comparable to that of US free trade agreement partners as stipulated in the US Inflation Reduction Act. This equivalence would enable EU enterprises to engage in fair competition with counterparts from the US and other countries like Chile, the Republic of Korea, and Japan in the US market.

Particularly referring to Japan, a significant development occurred as the European Commission's Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs, in conjunction with the Japan Organization for Metals and Energy Security (JOGMEC), signed an "Administrative Arrangement on Cooperation in Critical Raw Materials Supply Chains" in Brussels[61]. This

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[59] European Commission. (2023, June 20). *Global Gateway: EU invests €110 million to advance education, health and green energy in Zambia.* In European Commission. Retrieved July 23, 2023, from https://ec.europa.eu/commission/presscorner/detail/en/ip_23_3351 For more information see also: The Sub-Regional Office for Central Africa (ECA-SRO-CA) & UN Economic Commission for Africa (ECA). (2022, April 29). *Zambia and DRC Sign Cooperation Agreement to manufacture electric batteries.* Uneca.Org. Retrieved July 11, 2023, from https://www.uneca.org/stories/zambia-and-drc-sign-cooperation-agreement-to-manufacture-electric-batteries

[60] European Commission. (2023, June 14). *EU moves forward with Critical Minerals Agreement negotiations with the US.* In European Commission. Retrieved August 19, 2023, from https://ec.europa.eu/commission/presscorner/detail/en/ip_23_3214

[61] European Commission. (2023, July 6). *Enhancing cooperation with Japan on critical raw materials supply chains through a new Administrative Arrangement.* In European Commission. Retrieved August 19, 2023, from https://single-market-economy.ec.europa.eu/news/enhancing-cooperation-japan-critical-raw-materials-supply-chains-through-new-administrative-2023-07-06_en

arrangement took place ahead of the EU-Japan Summit in July 2023.

These strategic partnerships not only present opportunities for regional cooperation but also offer a means to navigate the challenges arising from increased geopolitical competition. By fostering collaboration instead of competition at the national level, these partnerships create synergies that can benefit both regions, advancing the shared goal of sustainable raw materials management.

1.3.3 CRM Act setting the path for keep promoting Bilateral Cooperation and Sustainable Partnerships in Raw Materials Diplomacy

Finally, all these examples have shown the strong commitment of the EU in establishing bilateral cooperation with resource-rich countries by also align with their specific needs and include support for local value creation, research, and development projects. This can involve investing in smelting and refining capacity, infrastructure development, and promoting partner countries' involvement in green technology value chains, such as battery production. Furthermore, the EU is willing to address concerns about transparency and human rights violations in all producing countries by mainly supporting states that demonstrate to prioritize social and political rights alongside emissions reduction promises. By fostering strategic partnerships based on sustainability, respect for human rights, and mutual benefit, the EU and its member states can navigate the challenges and opportunities associated with critical raw materials and contribute to a more sustainable and responsible global minerals sector.

Lastly, in accordance with Article 33 of the Regulation, the EU places priority on establishing partnerships with countries that have the capacity to significantly contribute to the EU's security of supply for critical raw materials. As well as, these partnerships are sought with countries that exhibit strong regulatory frameworks, encompassing environmental and social responsibility, transparency, and respect for human rights. Additionally, consideration is given to existing cooperation agreements between a third country and the EU, while emerging markets and developing economies with potential for Global Gateway Investments deployment are also taken into account.

In conclusion, and referring to this last point, the subsequent chapter will delve into a detailed examination of the correlation between the EU's recent

endeavours in raw materials diplomacy and the emerging Global Gateway plan that has been previously referenced. This analysis aims to shed light on the interconnectedness and implications of these initiatives, elucidating their role in shaping the EU's approach to global raw materials management.

CHAPTER 2:

RAW MATERIALS DIPLOMACY AND THE GLOBAL GATEWAY PLAN

2.1 FORGING SUSTAINABLE DEVELOPMENT THROUGH "MINERAL DIPLOMACY"

As underlined in the previous chapter, ensuring a stable and uninterrupted supply of raw materials to the European economy is of crucial importance. It is clear – given its pivotal role as exporter of finished goods - that the European economy relies heavily on a secure inflow of raw materials, particularly mineral imports. This historical condition, already highlighted at the beginning of the 1970s by Altiero Spinelli then EC Commissioner for industry, has only heightened in recent years. Escalating global commodity prices, restrictions on exports, and levies imposed by developing nations to favour their domestic markets, along with the intensified presence of global competitors in mineral-rich territories, have had, therefore, direct impacts on European companies.

These explains the urgence of and EU "mineral policy" in the last decades and, given the relatively modest self-reliance of the EU in terms of critical raw material supply, the crucial role taken by the issue of ensuring access to mineral resources beyond the EU's borders, under fair and equitable conditions. Indeed, as mentioned under the first pillar of the Raw Materials Initiative of 2008, the EU has been actively committed in pursuing raw materials diplomacy with regard to securing access to minerals[62]. Thus, the EU Raw Materials Diplomacy is the new flagship of the Union's international economic presence located between industrial policy, trade policy and development policy.

In order to better understand the EU's current mining diplomacy, it is

[62] Commission of the European Communities. (2008, November 4). *Communication from the Commission to the European Parliament and the Council. The raw materials initiative — meeting our critical needs for growth and jobs in Europe.* Retrieved July 11, 2023, from https://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2008:0699:FIN:en:PDF

therefore needed to have a step back and go through the most significant stages of its intricate journey and trace a continuum in the evolution of European diplomacy in this area: from its beginning to the Critical Raw Material Act (CRM Act) and the Global Gateway Plan.

2.1.1 The Evolution and Contemporary Relevance of EU-ACP Relations

The starting point can be set at the beginning of the 1970s, when the EC embarked on pioneering efforts establishing cooperation structures between industrialized and developing nations, giving specific attention to the mineral issues. It's a path of action with some clears steps.

a) The starting point must be retrieved in the First Lomé Convention signed in 1976 – which marked the commencement of trade cooperation between the European Community and a consortium of 71 African, Caribbean, and Pacific (ACP) states[63]. Central to the Convention's provisions, mineral commodities from ACP States were granted duty-free access to the European Community, accompanied by substantial aid and investment commitments from the EC: an arrangement, characterized by reciprocal benefits, aimed at ensuring stable sales and at stabilizing export prices for raw materials, all the while preserving essential market dynamics[64].

   Over successive revisions – Lomé II (1981-1985), Lomé III (1985-1990), and Lomé IV (1990-1999) – the Convention continued to evolve, enhancing the terms of ACP commodity trade. Part of the agreement was the progressive introduction of instruments to secure access to raw materials but also specific financial programmes - namely Stabex and Sysmin – designed to provide financial assistance to ACP primary product exporters (in particular, the Sysmin initiative was a stabilization program for mineral

[63] European Community (1975, February). *The Lomé Convention. Archive of European Integration*. Retrieved August 7, 2023, from http://aei.pitt.edu/60103/1/BN_15.77.pdf

[64] Tiess, G. (2010, May 19). *Minerals policy in Europe: Some recent developments*. Resources Policy, 35, p.190–198. https://www.sciencedirect.com/science/article/pii/S0301420710000255#section0025

exports)[65].

b) This approach witnessed further evolutions in the Cotonou Agreement in 2000, subsequently revised in Luxembourg in 2005 and Ouagadougou in 2010, which had effects until February 2020. A series of provisions were of interest to the field of minerals:

   (i) the Agreement - acknowledging the potential destabilizing impact of earnings volatility in the mining sector on the developmental trajectories of ACP states - introduced provisions counterbalancing the effects in terms of market distortions stemming from recovery of value-added tax on imports, discriminatory licensing systems, and exorbitant export duties[66];

   (ii) in order to address instability in export earnings, the Agreement foresaw a support system through the European Development Fund, underscoring the EU's commitment to fostering equitable and sustainable mineral diplomacy[67].

c) In addition, the EU's commitment to minerals diplomacy has been reaffirmed in recent years with a specific three-year initiative, consisting in a financial contribution of €13.1 million, in cooperation with the United Nations Development Programme (UNDP). Launched in 2017, the initiative is called the OACPS-EU Development Minerals Programme, because in April 2020 the group of ACP countries became an international organisation: the Organisation of African, Caribbean and Pacific States (OACPS). As a result, the programme is in line with the principles of the Lomé Convention and the Cotonou Agreement, reinforcing the EU's commitment to improving productivity, responsible mining practices, compliance with environmental standards and conflict prevention for the

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[65] Mahler, V. A. (1994, June). *The Lomé convention: Assessing a north-south institutional relationship*. Review of International Political Economy, 1(2), 233–256. https://doi.org/10.1080/09692299408434278

[66] Ibid.

[67] Hurt, S. R. (2003, February). *Co-operation and coercion? The Cotonou Agreement between the European Union and ACP states and the end of the Lome´ Convention*. Third World Quarterly, 24(1), 161–176. https://doi.org/10.1080/713701373

collective benefit of the partner countries, which in this case are Guinea, Uganda, Zambia, Jamaica and Fiji[68].

2.1.2 The Africa-EU Partnership

The same attention to the 'mineral issue' can be retrieved in a second example of regional interactions, culminated in the Joint Africa-EU Strategy (JAES). The JAES, enacted in 2007 and executed through triennial action plans, aimed to enhance the longstanding relationship between Africa and Europe, shifting it towards a more equal and mutually beneficial collaboration. In this context it played a significant role in the development of EU Raw Materials Diplomacy by providing a clear framework for cooperation between the two regions. Of particular significance, in this respect, is the successive Africa-EU Strategy Action Plan for 2011-2013, and the specific section defining the African-EU Partnership on Raw Materials[69]. Indeed, the strategic framework enacted in 2007 recognizes the vital role of raw materials in fostering economic growth and stability. More specifically it focused on enhancing Africa's capacities with the goal of fostering sustainable exploration, responsible resource management and environmental stewardship. In this light, the commitment to investment extends to the development of tools for mining corridor mapping, the promotion of local value-added processing, and the improvement of mineral policies. Furthermore, the Partnership acknowledges the importance of transparent revenue management, fair fiscal regimes, stakeholder engagement, and effective mineral contract negotiations, all of which contribute to the sustainable and responsible exploitation of raw materials.

In essence, the indications of the Africa-EU Partnership serve as a cornerstone for fostering cooperation and addressing challenges in the realm of raw materials. The comprehensive approach of the Partnership – covering aspects ranging from infrastructure development to governance and geological knowledge-

[68] For more information see also *Progress Reports*. Development Mineral Programm http://www.developmentminerals.org/index.php/en/resource/progress-reports

[69] Gerber, L. (2012, December). *Africa and the EU Mineral Trade*. EU Policy on Natural Resources, 77, 1–12. http://www.euromines.org/files/publications/africa-and-eu-mineral-trade.pdf

underscores the strategic importance of regional integration, trade, investment, and technological advancement in shaping a prosperous future for Africa and Europe in the realm of an equitable raw material diplomacy.

2.1.3 Economic Partnership Agreements: Strengthening EU-Africa Trade and Development Relations

In this context, a significant example of how the EU concretely promotes access to raw materials are the Economic Partnership Agreements (EPAs), which are regional trade agreements with the ACP Countries. A good example in this respect is the economic trade agreement that has emerged between the EU and the Southern African Development Community (SADC), encompassing Botswana, Lesotho, Mozambique, Namibia, South Africa, and Eswatini (former Swaziland). Termed the EU–SADC Economic Partnership Agreement (EPA), this agreement constitutes a development-oriented pact aimed at fostering economic growth and integration within these nations[70]. Central to these preferential arrangements is the belief that developing countries, grappling with multifaceted challenges, can harness preferential access to EU markets as a catalyst for economic advancement and enhanced integration into the global economy.

Conceived as a free trade area, the EPA is intended to stimulate increased production, thus boosting exports to the EU market. The substantial impact of these Economic Partnership Agreements is discernible in the surge of EU imports from SADC EPA countries. An in-depth examination of sectors underscores the potency of these agreements, particularly in the domain of precious stones and minerals. In fact, the SADC EPA countries, including South Africa, Botswana, Lesotho, and Namibia, emerge as significant exporters of diamonds[71]. The SADC EPA nations export a significant amount of precious stones, minerals, and agricultural products to the EU. A thorough examination finds significant expansion in industries like transportation and mineral goods, with mineral exports—primarily from Mozambique, Namibia, and South Africa—playing a key

[70] Kołodziejczyk, K. (2016, June 21). *EPA as a Tool for the Development of Sub-Saharan Countries*. Politeja, 13(3 (42)), 133–145. https://doi.org/10.12797/politeja.13.2016.42.09

[71] Cipollina, M. (2022, November 28). T*he Trade Growth under the EU–SADC Economic Partnership Agreement: An Empirical Assessment.* Economies, 10(12), 302, https://doi.org/10.3390/economies10120302

role[72].

2.1.4 Strengthening EU-Africa Cooperation and Raw Material Diplomacy Today

Finally, in the recent context, marked by the unveiling of the Joint Africa-EU Strategy 2020, it has to be underscored the effort to strengthen the strategic alliance between the EU and Africa, hinged upon five distinct partnerships:

(i) green transition and energy access,
(ii) digital transformation,
(iii) sustainable growth and jobs,
(iv) peace and governance,
(v) and migration and mobility.

Particularly relevant to our discourse is the first partnership, centred on green transition and energy access, given the links to critical raw materials, as the transition to sustainable energy sources is intrinsically linked to the availability and utilization of these resources[73]. In this domain both regions explicit a commitment to a low-carbon, resource-efficient, and climate-resilient future, aligning their trajectory with the Paris Agreement. It specifically highlights how important it is to promote a clean circular economy with a just and sustainable value chain and how this "requires enhanced cooperation between the EU and Africa for *responsible raw materials sector*, safe and clean industrial value chains, while respecting ambitious environmental and climate standards"[74].

It is therefore clear that, with an acceleration in recent years, EU-Africa relations have gradually moved towards a more equal and mutually beneficial partnership. Europe and Africa are strategic partners, and their relations are based on a comprehensive set of diplomatic, trade and financial instruments. In

[72] Ibid.

[73] Tenti, D.M. (2021, June 24). *How Can the EU Green Deal Affect EU-Africa Relations?* ISPI Online. Retrieved September 3, 2023, from https://www.ispionline.it/en/publication/how-can-eu-green-deal-affect-eu-africa-relations-30966

[74] European Commission. (2020, March 9). *Joint Communication to the European Parliament and the Council: Towards a comprehensive Strategy with Africa.* In European Union. Retrieved August 9, 2023, from https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52020JC0004

particular, in the area of raw materials, Africa-EU relations are considered a "key priority" for both countries, both to unlock Africa's renewable energy potential and to secure access to critical minerals.

Moreover, the agreement between the EU and Kenya, signed in June 2023 as the final stage of negotiations between the East African Community (EAC) and the EU that began in 2014 to implement an Economic Partnership Agreement between the two regions, is a perfect example of a broader trend of Western nations proactively engaging with African countries in response to the growing influence of countries such as China and Russia[75]. Indeed, it can be said that these EPAs not only promote regional trade integration, but also reinforce the principles of commodity diplomacy by facilitating the exchange of minerals between concerned African countries and the EU.

2.2 "GLOBAL GEOPOLITICAL RIVALRY: AFRICA'S ROLE AS A STRATEGIC BATTLEGROUND FOR RESOURCES AND INFLUENCE"

These developments in the relationship between the EU and Africa has to be put in the context of current developments. As a matter of fact, in the dynamic arena of global geopolitics, Africa has emerged as a pivotal battleground for major powers looking for allies, resources, and strategic partnerships. The African continent, rich of raw materials that fuel economic growth and technological advancement, has become a focal point in the worldwide race to secure these crucial resources.

This power struggle is more and more evident as dignitaries and leaders from various corners of the globe visit Africa on a regular basis, confirming the growing importance of the continent on the international stage. As a matter of fact, China's latest Ministers of Foreign Affairs, Qin Gang, ushered in his international debut by embarking on a visit to the African continent; a choice that mirrors the longstanding tradition of his predecessors, who, over the last three decades, have consistently chosen Africa as the inaugural destination of their yearly

[75] Bounds, A. & Schipani, A. (2023, June 14). *EU agrees trade deal with Kenya as Brussels aims to boost Africa ties*. Financial Times. Retrieved September 3, 2023, from https://www.ft.com/content/6c3c33f2-11f3-4e8c-8f9b-811fe7d84355

diplomatic itineraries[76]. The same degree of attention towards Africa has been showed also by the Russian Foreign Minister, Sergei Lavrov, who, over the years, has paid regular visits to African countries, establishing solid partnerships with nations such as South Africa, Sudan, Mauritania, and Mali.

Notably, the Western countries have demonstrated their unwavering commitment to the African continent too. This is discernible through the visits of key dignitaries from the United States, including Vice-President Kamala Harris, Secretary of State Anthony Blinken, and Treasury Secretary Janet Yellen, each undertaking distinct diplomatic missions. This heightened engagement was further underscored by First Lady Jill Biden's visits to Namibia and Kenya, emblematic of the renewed attention towards Africa within U.S. foreign policy.

Likewise, the European counterparts have accelerated their outreach to the continent. The quick succession of European engagements in Africa is best illustrated by Economic Commissioner Paolo Gentiloni's trip to Tunisia, Commission President Ursula von der Leyen's attendance as a guest of Kenyan President William Ruto, and President Macron's extensive trip to Angola, the Democratic Republic of the Congo, Gabon, and Congo-Brazzaville[77].

2.2.1 China's Dominance in the Africa's Mineral Race

While this list of trips signals a widespread attention, it is clear that among the contenders seeking to strengthen their foothold in Africa, China has gained a dominant position, asserting itself through an holistic strategy that encompasses diplomacy, trade, investment, and infrastructure development.

China's role in the global race for minerals, particularly within African countries, stands as a prominent example of its strategic pursuits and economic ambitions. As a matter of fact, over the past four decades, China has recognized in anticipation the pivotal role that international partnerships could play in fuelling its economic development. Central to its strategy is the cultivation of strong ties with strategically positioned nations, a principle underscored by its far-reaching "going

[76] Colarizi, A. (2022, January 1). *Africa rossa. Il modello cinese e il continente del futuro*.

[77] Barber, T. (2023, April 1). *Europe's foothold slips in Africa*. Financial Times. Retrieved September 4, 2023, from https://www.ft.com/content/fbf04b59-23ee-463d-a0b3-d7e358265cb1

global strategy"[78]. Emblematic of this approach is President Xi Jinping's vision to rejuvenate the historical "Silk Road", a conduit that historically facilitated trade beyond China's borders. This vision materialized into the "One Belt One Road Initiative", envisaged as a contemporary gateway to global markets and commerce[79].

Within this global perspective, Africa has become a crucial location of importance for China's economic objectives. The vast untapped resources of the continent align seamlessly with China's surging demand for metals and minerals: a symbiotic relationship that catalysed Chinese foreign direct investment (FDI) into mining and exploration[80].

The onset of the 21st century witnessed a swift surge in Chinese mineral demand, which, in turn, implied a strategic shift towards securing resources beyond domestic reservoirs. As a consequence, between 1995 and 2018, Chinese investments in African mining activities of non-fuel minerals have yielded tangible results, contributing to increase the mineral production of many African countries. At the same time, this expansion has bolstered China's grip on the continent's mineral output, a trajectory further evidenced by Chinese acquisition of companies active in minerals and metals industries. A strategic move that signals a resolute effort of the Chinese government to alter the historical dominance of European and North American mining companies that lasted for over a century.

At the heart of China's ability lies its approach to investment and development, epitomized by the "Belt and Road Initiative" (BRI) and its results[81].

As matter of fact, China's extensive lending activity towards African countries- which at present surpasses that of the US, Germany, Japan, and France

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[78] Dyer, G. & Tucker, S. (2007, December 3). *In search of illumination: Chinese companies expand overseas*. Financial Times. Retrieved September 4, 2023, from https://www.ft.com/content/176f01c2-a1d6-11dc-a13b-0000779fd2ac

[79] Abegunrin, O. & Manyeruke, C. (2020). *China's One Belt One Road Initiative in Africa*. In China's Power in Africa. A new global order (pp. 187–206). Palgrave Macmillan. https://doi.org/10.1007/978-3-030-21994-9_11

[80] Ericsson, M., Löf, O., & Löf, A. (2020, July). *Chinese control over African and global mining—past, present and future.* Mineral Economics, 33(1–2), 153–181. https://doi.org/10.1007/s13563-020-00233-4

[81] Abegunrin, O. & Manyeruke, C. (2020), *supra* 79.

combined - underscores its commitment to promoting infrastructure, construction, and trade investment. This overarching Chinese presence is confirmed by the rising trends in bilateral trades. In 2021, the total trade between Africa and China amounted to USD 254.3 billion, reflecting an annual growth rate of 35.3%. Africa's exports to China reached USD 105.9 billion, showcasing an annual growth rate of 43.7%[82]. This surge in economic engagement underscores China's ascendancy as a dominant force in Africa's economic landscape.

China's presence is conspicuously evident across several African nations, including Ghana, South Africa, Zambia, Zimbabwe, the Democratic Republic of Congo (DRC), Eritrea, and Guinea. The spectrum of minerals under Chinese control spans an array of economically significant resources, ranging from copper and bauxite to cobalt, zinc, gold, manganese, chromite, and uranium. This strategic allocation of resources underscores China's pragmatic orientation, capitalizing on metals of critical industrial importance.

In essence, China's role in the global race for minerals, particularly in African countries, emerges as a pivotal intersection of strategic vision, economic expansion, and geopolitical manoeuvring. The multifaceted endeavours underpinning China's mineral pursuit underscore its intricate web of influence, drawing together the realms of commerce, diplomacy, and development in a complex geopolitical tapestry.

This success can be attributed to two crucial factors: China's non-colonial history and its policy of non-interference in third nations' internal affairs[83]. Yet, China's pursuit of an ever-greater influence on the African continent has downsides as well. While China's investments into infrastructures are supposed to support a country's development, they often capture strategically positioned developing countries in a debt trap, making it even more vulnerable to Chinese

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[82] Bommino, C. (2022, July 6). *Lo sguardo cinese sull'Africa tra cooperazione e politica di potenza.* Geopolitica.Info. Retrieved September 4, 2023, from https://www.geopolitica.info/cina-africa-cooperazione-politica-potenza/#:~:text=La%20conseguenza%20%C3%A8%20che%20lo,miliardi%20di%20dollari%2C%20con%20una

[83] Ferrari, A. (2022, March 4). *Le ragioni dello strapotere di Pechino in Africa.* AGI-Agenzia Italiana. Retrieved September 4, 2023, from https://www.agi.it/estero/news/2022-03-04/ragioni-strapotere-cinese-in-africa-15856953/

influence[84]. In many instances, the objectives of Chinese-supported projects extend beyond supporting local economies to facilitating resource access and market penetration. This economic model, bolstered by concessional loans, highlights China's economic intelligence and calculated diplomacy.

2.2.2 EU Raw Materials Diplomacy In Africa as a Response to China's intervention

Against this backdrop of heightened international attention, the European "Global Gateway Plan" emerges as a strategic initiative that seeks to navigate the complexities of raw materials diplomacy and infrastructure development in Africa, while countering China's assertive presence. In the ever-evolving landscape of global geopolitics, the European Union has strategically embarked on a counter-offensive to counterbalance China's ascendancy in the pursuit of raw materials and influence, particularly in Sub-Saharan Africa (SSA) and other regions worldwide.

A discernible dichotomy exists between the approaches adopted by these two geopolitical giants to access and secure natural resources. While China's engagement often involves a web of political manoeuvres, development aid, infrastructure projects, and state-owned enterprises (SOEs), the EU's stance centres on economically liberal access to raw materials rooted in market principles, transparency, and good governance[85].

This strategic divergence is underscored by the active utilization of EU trade policies, specifically the inclusion of rules in bilateral and multilateral agreements, aimed at ensuring equitable access to raw materials. The EU and its Member States have pursued a multifaceted strategy underpinned by trade and investment policies, as well as development cooperation. This two-pronged approach targets potential trade-distorting measures through trade policies, while development cooperation endeavours to bolster good governance and enhance state capacities, ultimately

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[84] Chellaney, B. (2017, January 23). *China's Debt-Trap Diplomacy*. Project Syndacate. Retrieved September 4, 2023, from https://www.project-syndicate.org/commentary/china-one-belt-one-road-loans-debt-by-brahma-chellaney-2017-01

[85] Tröster, B. Küblböck, K. & Grumiller, J. (2017). *EU's and Chinese raw materials policies in Africa: converging trends?* Change of Course (BEIGEWUM)., 3/2017. http://www.beigewum.at/wp-content/uploads/KW_3_2017_Tr%C3%B6ster-K%C3%BCblb%C3%B6ck-Grumiller.pdf

paving the way for open investment and natural resource policies. In stark contrast, China's economic activities in Africa are founded upon a network of robust political and developmental relationships with African nations, characterized by features of reciprocity and its well-known principle of 'non-interference[86]'.

A salient point of contention lies in the conditionalities attached to policies relating to raw materials. While the EU emphasizes the importance of transparency and good governance in resource-rich countries, often prioritizing these conditions in its agreements, China's 'non-interference' principle often results in the exclusion of such conditionalities. As a consequence, the engagement with non-democratic and authoritarian regimes, coupled with the disregard for social and environmental standards, has garnered criticism from Western actors.

However, as the EU advances its fighting-back, it still faces significant challenges. Europe's historical involvement in Africa carries a complex legacy that shapes perceptions and interactions on both sides. Europe's post-colonial engagement in Africa has been a mix of grand promises, inconsistent follow-through, and missed opportunities, leading to a sense of self-interest and skepticism among African leaders. This historical legacy not only shapes the attitudes and behaviour of those involved but also the fundamental structure of their economic interactions[87].

In contrast, the EU in the last decades has advocated for an engagement with Africa that goes beyond resource extraction. Unlike China, which often focuses on rapid resource extraction, the EU emphasizes responsible and sustainable partnerships by promoting ethical business practices, respect for labour standards, and environmental sustainability.

In this context, the Global Gateway plan aims to go beyond the framework characterised by various agreements between the EU and African states, including those on raw materials, that we have examined in the previous section. By many means it represents a significant departure from the EU's foreign policy approach

[86] Ibid.

[87] Beattie, A. (2023, March 23). *EU seeks to tone down the imperial style in search for critical minerals*. Financial Times. Retrieved September 4, 2023, from https://www.ft.com/content/fe8d650d-19b9-482d-ab96-be692620e407

to this type of agreement. Indeed, in line with Europe's growing focus on infrastructure and connectivity, and in contrast to initiatives such as China's Belt and Road Initiative, the Global Gateway represents a shift towards substantial investment in key infrastructure projects, as well as in the energy and manufacturing sectors, aimed at strengthening Europe's connectivity with the rest of the world. In this context, the following section analyses the characteristics of the plan, its geopolitical significance and the financial design to support this major project.

2.3 GLOBAL GATEWAY PLAN: BUILDING BRIDGES FOR EUROPE'S STRATEGIC AUTONOMY AND GLOBAL CONNECTIVITY

The Global Gateway Plan, launched in December 2021, marks the EU's inaugural global infrastructure initiative and plays a critical role in ensuring the Union's strategic autonomy across various sectors. What sets this plan apart from previous initiatives are four distinct elements.

a) The "connectivity" element, with a focus on physical and digital infrastructure projects, renewable energy, trade enhancements, and capacity-building. Through this approach, it strengthens links between Europe and the world, improving value chains and fostering global interdependence and peaceful cooperation.
b) The 'sustainable" element, given that European values will be translated into stringent standards in areas such as financial and environmental sustainability, procurement transparency, and social issues[88]
c) The "strategic autonomy" dimension, given that in an era of hyper-competition among economic powers, any ambition for strategic autonomy cannot be separated from a robust external action aimed at

[88] Kuo, A. (2021, September 28). *Global Gateway: The EU Alternative to China's BRI*. The Diplomat. Retrieved September 4, 2023, from https://thediplomat.com/2021/09/global-gateway-the-eu-alternative-to-chinas-bri/

strengthening ties with partner countries and reducing the Union's strategic dependencies[89].

2.3.1 Delivering the Plan: EU financial Asset for the Global Gateway

The fourth aspect is the financial one. The Global Gateway Plan aims to enhance interpersonal ties between Europe and its partnering regions while directing investments to address recently exposed or exacerbated infrastructure deficiencies in some key areas: digital technology, climate and energy, transportation, healthcare, education, and research[90]. To match the required scale of investment, the Global Gateway Plan will mobilize resources for international infrastructure, with a particular focus on attracting private sector investments with public funds acting as a catalyst for private investment, generating a multiplier effect on the deployed resources.

A second important point regarding the financial design of the plan is the role played by the European Investment Bank and other financial institution. Indeed, the EU commitment should be carried out on the basis of a comprehensive arsenal of financial tools orchestrated by the European Commission in strategic partnership with EIB and the European Bank for Reconstruction and Development (EBRD). The Commission is clear in indicating the need to leverage on existing instruments, both private and public, and channel them towards the overarching objectives of the Global Gateway[91]. In addition to that the EU will marshal resources through financing mechanisms including Horizon Europe, InvestEU, and the European Fund for Sustainable Development (EFSD+), which is to furnish up to 135 billion euros in support of the initiative,

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[89] Gilli, A. & d'Ambrosio Lettieri, F. (2023, June). *Global Gateway: un tassello dell'autonomia strategica europea?* ISPI Online. https://www.ispionline.it/it/pubblicazione/global-gateway-un-tassello-dellautonomia-strategica-europea-130963

[90] European Commission. (2021, December 1). *Joint Communication to the European Parliament, the Council, the European Economic and Social Committee, the Committee of the Regions and the European Investment Bank*. In European Commission. Retrieved September 5, 2023, from https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52021JC0030

[91] Furness, M. & Keijzer, N. (2022). *Europe's Global Gateway: A New Geostrategic Framework for Development Policy?* German Development Institute, 1. https://www.idos-research.de/briefing-paper/article/europes-global-gateway-a-new-geostrategic-framework-for-development-policy/

including a new initiative with the EIB that could bring €25 billion of additional investments.

Complementing this, 18 billion euros will derive from the Union budget and potential investment inflows of up to 145 billion euros from diverse European financial institutions dedicated to development further contribute to the financial robustness of the plan[92]. The financial framework of the Global Gateway also taps into the innovative "NDICI – Global Europe" financial instrument introduced by the EIB. With a budget allocation of 79.5 billion euros for the 2021-2027 period, this mechanism is engineered to bolster the EU's external activity, prioritizing strategic action within its neighbourhood and beyond[93]. Some concrete actions have been carried out.

In May 2022, with the signing of a guaranteed agreement amounting to 26.7 billion euros. Under the aegis of the EFSD+ and the NDICI-Global Europe, this agreement pledges the European Commission's commitment to underpin the financial operations of the EIB[94].

In December 2022 further dynamism ensued with the inception of the Global Gateway Fund (GGF) orchestrated by the EIB to stimulate private sector investments with 40% of the funds earmarked for sustainable infrastructure projects, another 40% for catalysing the growth of small and medium-sized enterprises in these economies, and the remaining 20% allocated for project finance[95].

Moreover, an additional milestone was reached in April 2023, culminating in an agreement between the EIB and the Commission to dedicate an extra 18 billion

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[92] Tagliapietra, S. (2022, August). *The Global Gateway: an overview*. Infrastructure Policy Initiative. https://www.wilsoncenter.org/sites/default/files/media/uploads/documents/Global%20Gateway%208-1-22.pdf

[93] European Commission (2021), *supra* 90.

[94] *European Commission and EIB sign an Agreement to enable further investments worldwide*. (n.d.). European Neighbourhood Policy and Enlargement Negotiations (DG NEAR). https://neighbourhood-enlargement.ec.europa.eu/news/european-commission-and-eib-sign-agreement-enable-further-investments-worldwide-2022-05-10_en

[95] *Global Gateway Fund (GGF)*. (n.d.). European Investment Bank. https://www.eib.org/en/projects/all/20220752

euros in investments under the Global Gateway initiative, elevating the EIB financial engagement to a cumulative sum of 31 billion euros within the framework of the Global Gateway, in line with the objective of a total investment of 100 billion euros by 2027[96].

Another final element worth mentioning is the 'Team Europe' package, which combines resources from the EU, Member States, the European Investment Bank and the European Bank for Reconstruction and Development. More importantly, Team Europe is designed to be a tool trough which deliver initiatives, representing another important step in this process of consolidation of Europe's development finance, specially concerning the strategic coordination between EU countries and EU institutions and financial institutions[97].

2.3.2 Global Gateway Africa – Europe Investment Package

In the context of the GG Initiative, perhaps the most significant initiative has been the launch of the first regional Global Gateway Africa-Europe Investment Package in February 2022. Following the joint commitments of the 6th EU-African Union Summit, the package aims to boost public and private investment and support Africa for a strong, inclusive, green and digital recovery and transformation, sustainable growth and decent job creation[98].

The initiative foresees an investment package of 150 billion euros. Investments will support clean energy, biodiversity, agri-food systems, climate resilience and disaster risk reduction. Other areas include transport, supporting businesses, inclusive and integrated economies, and sustainable regional value chains, including mineral raw materials. It will also strengthen health systems and

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[96] *Global Gateway: Commission and EIB announce funds worth €18 billion to boost investments in climate action and sustainable economies*. (2023, April 28). European Investment Bank. https://www.eib.org/en/press/all/2023-187-global-gateway-commission-eib-announce-funds-eur-18-billion-boost-investments-climate-action-sustainable-economies

[97] Bissonauth, R.; Del Re, E.; Elìn Arnadottir, R. & Torsti, P. (2023, May 4). *Global Gateway: from aid to partnership? The State of the Union Conference, 2023, Building Europe in times of uncertainty* [Video]. YouTube. Retrieved September 5, 2023, from https://hdl.handle.net/1814/75647

[98] Council of European Union. (2022, February 17). *6th European Union - African Union Summit: A Joint Vision for 2030*. In Consilium.europa. Retrieved September 5, 2023, from https://www.consilium.europa.eu/media/54412/final_declaration-en.pdf

science, technology, education and training in participating countries.
Priority areas underlined by the plan:

(i) accelerating energy and digital transitions,
(ii) promoting sustainable growth and employment,
(iii) improving healthcare and education systems,
(iv) focusing on infrastructure integration[99].

In particular, this package focuses on supporting Africa's green transition, where the EU is keen to support regional energy integration, energy efficiency, renewable energy (including smart grids and wind farms) and just transition, while diversifying its own clean energy supply[100].

To this end, projects will focus on:

(i) renewable hydrogen production and the EU will promote the creation of undistorted and competitive hydrogen trading markets,
(ii) infrastructure for developing sustainable and resilient raw materials value chains.

The communication on the Global Gateway mentions that, to achieve these goals, the EU will mobilise €2.4 billion in grants for Sub-Saharan Africa and €1.08 billion for North Africa[101]. This investment plan encompasses both public and private investments, aimed at fostering Africa's growth and transformation.

The Africa-EU Green Energy Initiative (AEGEI) was launched during the above-mentioned 6th AU-EU Summit[102]. It aims to support large-scale sustainable

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[99] *EU-Africa: Global Gateway Investment Package*. (2021, December 1). European Commission. https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/stronger-europe-world/global-gateway/eu-africa-global-gateway-investment-package_en

[100] Tenti, D.M. (2021, June 24), *supra* 73.

[101] Szczepański, M. (2023, January). *The Global Gateway Taking stock after its first year*. In European Parliament. Retrieved September 5, 2023, from https://www.europarl.europa.eu/thinktank/en/document/EPRS_BRI(2023)739296#:~:text=The%20global%20investment%20gap%20between,and%20Russia's%20invasion%20of%20Ukraine.

[102] European Commission. (2022, November 28). *EU-Africa: Global Gateway Investment Package - Africa-EU Green Energy* Initiative. In European Commission. Retrieved September 5, 2023, from https://ec.europa.eu/commission/presscorner/detail/en/fs_22_1120

electrification programmes on the African continent with the goal of transforming the prospects of African people and helping the economy to grow, by addressing some key priorities such as:

(i) Regional electricity interconnections and market integration,
(ii) Renewable energy, access to energy and promoting sustainable energy uses,
(iii) Just Energy Transition Partnerships in Africa,
(iv) Access to energy

By 2030, the EU-Africa Green Energy Initiative aims to provide at least 100 million people with access to electricity and €3.4 billion in EU grants will be delivered through Team Europe to support renewable energy, energy efficiency, the just transition and the greening of local value chains[103].

On the African continent, the massive deployment of renewable energy and clean hydrogen production is contributing to the goal of having at least 40 gigawatts of electrolyser capacity by 2030 and is helping to develop the renewable hydrogen sector by creating business opportunities on both the supply and demand side for energy-intensive industries. In this regard, among the many initiatives promoted by the Africa-EU Green Initiative and under the investment umbrella of the Global Gateway Plan are numerous photovoltaic, solar and green hydrogen plants in countries such as Morocco, Nigeria, Djibouti; just energy transition partnerships with South Africa and Senegal; and, of course, several critical raw material partnerships as mentioned in previous chapters[104].

[103] Dejonghe, M. (2023, July). *Unlocking Global Gateway towards the Green Transition*. Egmont policy brief 313. https://www.egmontinstitute.be/app/uploads/2023/07/Marie-Dejonghe_Policy_Brief_313_vFinal.pdf?type=pdf#:~:text=In%20December%202021%2C%20the%20president,green%20and%20digital%20infrastructure%20development.

[104] *Global Gateway 2023 Flagship projects - Infographics*. (n.d.). International Partnerships. https://international-partnerships.ec.europa.eu/publications/global-gateway-2023-flagship-projects-infographics_en

CHAPTER 3:

CASE STUDY: THE EU-NAMIBIA PARTNERSHIP ON CRITICAL RAW MATERIALS AND GREEN HYDROGEN

3.1 INTRODUCING THE CASE STUDY

As indicated in the previous sections, the EU's traditional engagement in Africa, has increased its relevance in recent years. In this context of increased relationships, the Memorandum of Understanding establishing a strategic partnership between the EU and Namibia represents a significant example of how these relationships have evolved in the years. This chapter marks a pivotal juncture where theory converges with practical application, crystallizing the culmination of ideas and concepts established in the previous sections.

From its inception, this thesis has been committed to exploring the diplomatic angle of EU raw material diplomacy. This endeavour began with a comprehensive analysis, presented in the first chapter, which navigated the intricacies of European mineral diplomacy. Here, it has been unravelled the very essence of its objectives and the tools deployed, including international agreements and partnerships. With the groundwork thus laid, the stage was set for a more focused exploration of specific examples.

In particular, the CRM Act embodies the culmination of critical raw material diplomacy's. This pivotal piece of legislation not only signifies a paradigmatic shift but also encapsulates the aspirations of a harmonized European approach. At the same time, the Global Gateway Plan emerged as a framework full of potential, guiding the EU's collective goal toward strategic autonomy and the fortification of supply chains. This vision materialized through a series of strategic partnerships between the EU and third countries, increasing the scope of the CRM Act.

However, it is the symbiotic interplay of these elements, further augmented by the author's personal intrigue in the Sub-Saharan region, that positions the EU-Namibia Partnership on sustainable raw materials value chains and renewable

hydrogen as a perfect example of an embodiment of diplomacy, resilience and global cooperation.

This chapter's goal is to provide a detailed analysis of the partnership, including a discussion on its goals and methods, assessing its outcomes, and revealing the broader implications it casts on the canvas of international relations and sustainable development. In order to comprehensively explore this journey, a series of insightful interviews were conducted with key officials from the European External Action Service and the European Commission. These interviews shed light on the nuanced strategies and perspectives that have guided the EU's mineral diplomacy in this specific case study.

3.2 THE MINING SECTOR IN NAMIBIA

For most developing countries, SADC region included, the mining sector emerges as the very lifeline for economies in terms of multifaceted benefits ranging from income generation, employment opportunities, and government revenue to an infusion of foreign direct investment[105]. It assumes a role of paramount significance in the economic narratives of various countries. Beyond its financial implications, it carries a dual-edged influence encompassing both the social texture and economic vitality of communities.

Namibia, in this context, distinctly mirrors this global trend, where mining has invariably held the mantle as the bedrock of its economic framework. The economic prosperity catalysed by the sector reverberates palpably through the tangible outcomes of job creation and augmented income streams. Mining in Namibia, like its global counterparts, has not only facilitated economic expansion, but has also been an incentive for social transformation. The creation of towns, such as Oranjemund and Arandis, intricately linked with mining hubs accentuates the far-reaching socio-economic scope of this sector.

A lens cast upon the post-independence era from 1990 onward unveils a remarkable and unwavering trajectory, with the mining sector's contribution to

[105] Walser, G. (2002, April 1). *Economic Impact of World Mining*. In U.S. Department of Energy Office of Scientific And Technical Information. Retrieved August 23, 2023, from https://www.osti.gov/etdeweb/biblio/20265794

GDP towering steadfastly at a noteworthy 11.1%[106].

3.2.1 Overview of mineral resources in Namibia

Diving deeper into the tapestry of mineral resources that characterize Namibia's geological canvas, a panorama of diverse riches unfurls. Throughout history, the diamond mining has been the preeminent cornerstone of Namibia's mining industry, an emblem of its mineral heritage.

Furthermore, Namibia asserts its position as the world's fourth-largest producer of uranium oxide, perpetually propelled by the unceasing demands of the nuclear industry[107]. The Husab open-pit uranium mine stands as a monumental testament, having yielded an impressive 3,028 tons of uranium oxide in 2018. A colossus in its own right, the Rossing Uranium mine—seated within the Namibian desert—stands as the fifth-largest contributor to uranium oxide production globally. Notably, this mine boasts the world's most extensive uranium deposit intertwined with igneous rock, predominantly owned by the China National Uranium Corporation (CNUC). Moreover, in 2021, Namibia exported $282k in Uranium and Thorium Ore, making it the 10th largest exporter of Uranium and Thorium Ore in the world[108].

Zinc emerges as another pivotal protagonist within Namibia's mineral narrative, bolstered by operational ventures such as Skorpion Zinc, operated under Vedanta Resources, and Rosh Pinah, a consortium ownership with Exxaro Base Metals as the dominant stakeholder at 46%[109].

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[106] Nambinga, V. & Mubita, L. (2021). *The Impact of Mining sector to the Namibia economy. Assessing socio-economic and environmental effects.* In Republic of Namibia. Office of the President. Retrieved August 23, 2023, from https://www.npc.gov.na/wp-content/uploads/2022/02/The-Impact-of-Mining-sector-to-the-Namibia-economy-FINAL.pdf

[107] Schneider, G. (2009). *Treasures of the Diamond Coast. A Century of Diamond Mining in Namibia.* Macmillan Education Namibia Publishers. https://worldcat.org/it/title/575003068

[108] For more information see also *Uranium and Thorium Ore in Namibia | OEC*. (n.d.). OEC - the Observatory of Economic Complexity. https://oec.world/en/profile/bilateral-product/uranium-and-thorium-ore/reporter/nam

[109] Cairncross, B., & Fraser, A. (2012, September). *The Rosh Pinah Lead-Zinc Mine, Namibia.* Rocks & Minerals, 87(5), 398–409. https://doi.org/10.1080/00357529.2012.707928

Furthermore, just beyond the horizon of Tsumeb town, the Tschudi copper mine commenced its operations in 2015, a culmination of a journey that embarked back in 1991. Distinct for its production of 99.998% pure copper, the Tschudi mine signifies the diversification of Namibia's resource portfolio. In 2021, Namibia exported $535M in raw copper, making it the 8th largest exporter in the world[110]. At the same year, raw copper was the 3rd most exported product in Namibia. The main destination of exports from Namibia are: Belgium ($352M), Netherlands ($127M), India ($22.6M), China ($12.2M), and South Korea ($12.1M)[111].

Namibia's mineral wealth extends even further, encompassing the realm of iron ore with the coexistence of magnetite and hematite deposits. However, the country's mineral abundance extends beyond its known areas, as Namibia is emerging as a growing source of critical minerals that underpin the edifice of renewable energy technologies. In addition, Namibia is home to coveted reserves of lithium, graphite, tantalum and rare earth minerals. Most recently, the discovery of cobalt in the Kunene Region evoked the prospect of Namibia's elevation as a substantial cobalt player on the global stage[112]. In this symphony of mineral abundance, the Australian enterprise Celsius has etched its mark with the Opuwo Cobalt Project, which, as unveiled through Celsius' 2020 annual report, emerges as an emblem of global significance[113]. This ambitious enterprise hosts a cobalt-copper mineralisation deposit exceeding 126,000 tonnes of cobalt: a resounding echo that places it among the most important cobalt deposits in sub-Saharan Africa[114].

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[110] For more information see also *Raw Copper in Namibia | OEC*. (n.d.). OEC - the Observatory of Economic Complexity. https://oec.world/en/profile/bilateral-product/raw-copper/reporter/nam

[111] Ibid.

[112] *Battery Minerals*. Chamber of mines. https://chamberofmines.org.na/portfolio/battery-minerals/#:~:text=Namibia%20has%20known%20deposits%20of,pre%2Dfeasibility%20and%20feasibility%20stages.

[113] Celsius Resources. (2021, July 1). *Celsius doubles mineral resource at Opuwo cobalt-copper project. Celsius Resources*. Retrieved September 19, 2023, from https://celsiusresources.com/celsius-doubles-mineral-resource-at-opuwo-cobalt-copper-project/

[114] Muyongo, A. (2023, August 30). *Overview of Critical Mineral deposits in Namibia - Geological Survey*. In Mining Expo Namibia. Retrieved September 8, 2023, from https://miningexponamibia.com/wp-content/uploads/2020/09/Overview-of-Critical-Minerals-Deposits-in-Namibia-Geological-Survey-of-Namibia.pdf

Bolstered by this striking revelation, Namibia's mineral troves have continued to flourish. In 2022, the nation unveiled another chapter in its mineral narrative - a rare earth elements (REEs) discovery on a north central Namibian farm[115]. This discovery further underscores Namibia's emergence as a haven for resources of global importance, particularly in the realm of rare earths such as terbium and dysprosium. These elements find their crucial place as building blocks for permanent magnets within the realms of electric car batteries and wind turbines. At the forefront of this narrative stands the Lofdal Project - a heavyweight repository of heavy rare earth metals. This project is the result of the collaborative efforts between Namibia Critical Metals and the Japan Oil, Gas and Metals National Corporation (JOGMEC)[116].

Furthermore, within the arid hills of Erongo lies the settlement of Uis - a remote yet compelling place that has recently become a source of interest in the global lithium race[117]. In a strategic manoeuvre, Australian entity Askari Metals has set its sights on the acquisition of Namibia's AstralL Dynamix Mining Investment (AstralL DMI)[118]. This strategic move secures a prized possession within Namibia's Uis pegmatite belt - an endeavour that resounds with the symphony of lithium's global demand[119].

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[115] *Namibia - Mining and Minerals.* (2022, October 3). International Trade Administration | Trade.gov. https://www.trade.gov/country-commercial-guides/namibia-mining-and-minerals

[116] *Lofdal Heavy Rare Earths Project, north-western Namibia.* https://www.nsenergybusiness.com/projects/lofdal-heavy-rare-earths-project/#:~:text=Lofdal%20Project%20in%20Namibia%20is,Metals%20National%20Corporation%20(JOGMEC).

[117] Dempsey, H. (2023, April 3). *How China is winning the race for Africa's lithium*. Financial Times. Retrieved August 23, 2023, from https://www.ft.com/content/02d6f35d-e646-40f7-894c-ffcc6acd9b25

[118] Booysen, R.; Lorenz, S.; Thiele, S.T.; Fuchsloch, W.C.; Marais, T.; Nex, P.A.; & Gloaguen, R. (2022, February). *Accurate hyperspectral imaging of mineralised outcrops: An example from lithium-bearing pegmatites at Uis, Namibia.* Remote Sensing of Environment, 269, 112790. https://doi.org/10.1016/j.rse.2021.112790

[119] Mining Technology. (2023, July 4). *Askari Metals expands lithium footprint in Namibia*. Mining Technology. Retrieved September 19, 2023, from https://www.mining-technology.com/news/askari-expands-lithium-namibia/?cf-view

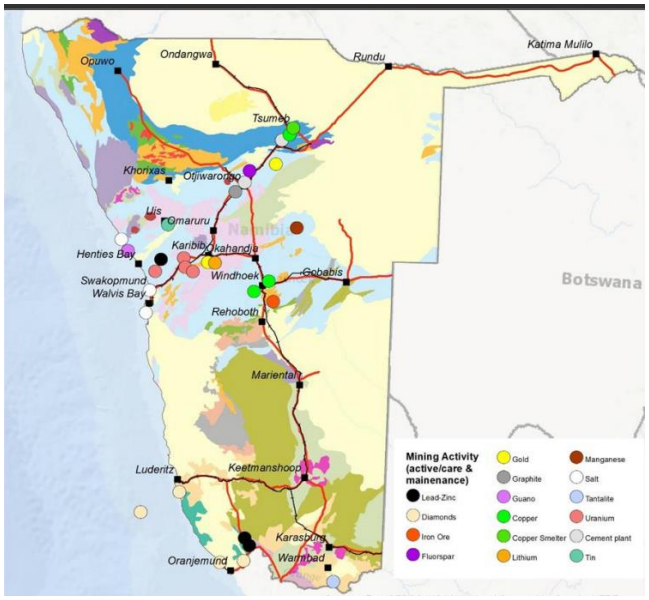

Figure 1. Source: Muyongo. (2023, August 30). Overview of Critical Mineral deposits in Namibia - Geological Survey. In Mining Expo Namibia. Retrieved September 8, 2023, from https://miningexponamibia.com/wp-content/uploads/2020/09/Overview-of-Critical-Minerals-D

3.2.2 Namibia's Mining Sector: Foreign Ownership, and Resource Nationalism

Given the sheer abundance of these valuable resources, the mining sector undeniably stands as one of Namibia's most pivotal economic pillars.

As substantiated by a comprehensive report from the Office of the President of Namibia, the mining sector has consistently played a central role in the nation's economic landscape. It has not only contributed significantly to economic growth but has also been a reliable source of employment, underpinning Namibia's socio-economic development[120].

However, as outlined in the previous paragraph, it is also evident that the ownership of several mines is largely dominated by foreign companies who mainly extract and export such minerals to external markets. Within this intricate dynamic of an external involvement, Namibia finds itself treading a delicate path, trying to strike a balance between facilitating external engagement for economic benefits and safeguarding its sovereign interests, thus charting a unique course in the realm of mineral resource management.

In light of the predominance of foreign ownership of mines in Namibia, the

[120] Nambinga, & Mubita. (2021), *supra* 106.

government is increasingly leaning towards a form of *resource nationalism*, echoing trends seen in other African nations[121]. This shift is exemplified by the government's recent decision to impose a ban on the export of certain unprocessed minerals, including lithium ore, graphite, cobalt, and manganese, unless they undergo local processing. This move mirrors a similar measure implemented by Zimbabwe in December[122]. It's worth noting that this export ban doesn't apply to 'small quantities' of minerals[123]. Namibia's rationale behind this decision is to encourage local processing of these minerals instead of exporting them for processing abroad, with the aim of adding value to the country's economy.

Moreover, Namibia is exploring the possibility of acquiring minority stakes in mining and petroleum production companies, with a minimum equity ownership threshold. This approach, while aimed at bolstering the country's control over its resources, may potentially disrupt the supply of critical raw materials[124].

These developments raise intriguing questions about how the EU-Namibia Partnership aligns with this evolving landscape, characterized by resource nationalism and a desire for greater local control in the mining sector.

3.3 EU-NAMIBIA DIPLOMATIC RELATIONSHIP

The foundation of the EU-Namibia relationship is deeply rooted in historical milestones and a shared commitment to fostering cooperation across multiple dimensions. Namibia's Declaration of Independence on 21st March 1990

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[121] Dou, S.; Xu, D.; Zhu, Y.; & Keenan, R. (2023, February). *Critical mineral sustainable supply: Challenges and governance*. Futures, 146, 103101. https://doi.org/10.1016/j.futures.2023.103101

[122] Banya, N. (2022, December 21). *Zimbabwe bans raw lithium exports to curb artisanal mining.* Reuters. Retrieved September 19, 2023, from https://www.reuters.com/world/africa/zimbabwe-bans-raw-lithium-exports-curb-artisanal-mining-2022-12-21/

[123] Africa e Affari. (2023, June 14). *Namibia: terre rare, vietato export di minerali non trasformati.* Africa e Affari. https://www.africaeaffari.it/39330/namibia-terre-rare-vietato-export-di-minerali-non-trasformati

[124] Mbathera, E. (2023, March 9). *The government considers more shares in mining sector*. The Namibian. Retrieved September 8, 2023, from https://www.namibian.com.na/govt-considers-more-shares-in-mining-sector/

marked a pivotal moment, heralding the birth of a sovereign democratic state. In response, the European Community welcomed this beginning and swiftly established governmental relations the day after Independence. This bond was fortified by the moral and financial support extended by various EU Member States to the Southwest Africa People's Organisation (SWAPO) during the liberation struggle[125].

Formal diplomatic ties were solidified through the signing of the EU-Namibia Agreement in 1991, ushering in a phase of mutual diplomatic recognition between the Republic of Namibia and the European Union (then known as the Commission of the European Communities). This accord provided a robust framework for diplomatic interactions and collaboration[126].

The relationship's resilience was further cemented through Namibia's accession to the Lomé Convention, succeeded later by the Cotonou Agreement. These pivotal agreements formed the bedrock of EU-Namibia relations, serving as key cornerstones that fostered shared goals and collaboration across a range of areas.

The establishment of the European External Action Service (EEAS) provided a platform for enhancing coherence and consistency in the EU's external action towards Namibia. This step underscored the EU's commitment to nurturing enduring and productive relations with Namibia, recognizing it as an essential partner in the southern African region.

Over the years, EU-Namibia relations have transcended various realms, encompassing political dialogues, trade, development, and humanitarian aid. Noteworthy is the joint commitment showcased on the global stage, such as

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[125] Bols, A.; Du Pisani, A. & Zaire, D. (2014). *Namibia's Foreign Relations*. Macmillan Education Namibia. https://www.kas.de/documents/279052/279101/Namibia%27s+Foreign+Relations.pdf/a684f48b-afdf-fa83-385b-ab1ce8fc90c7?version=1.1&t=1626250545260#page=295

[126] Republic of Namibia & European Commission. (1991). *Agreement between the government of the Republic of Namibia and the Commission of the European Communities on the establishment and on the privileges and immunities of the Delegation of the Commission of the European Communities*. In https://www.eeas.europa.eu/delegations/namibia/eu-namibia-agreement_en. Retrieved August 30, 2023, from https://www.eeas.europa.eu/sites/default/files/agreement-between-eu-and-namibia-establishing-diplomatic-relations-1991_en.pdf

Namibia's pivotal support for the EU's participation in the work of the UN General Assembly in 2011, demonstrating the strength of diplomatic collaboration[127].

Economically, Namibia enjoys preferential access to the European market, with all its exports to the EU entering duty and quota free. This symbiotic economic relationship is reflected in trade surpluses and positive trade balances. The EU's advocacy for inclusive, multilateral trade arrangements, exemplified by the Economic Partnership Agreements (EPAs), has further fostered collaboration and balanced trade practices. The trade balance between Namibia and the EU demonstrates a positive trend. In 2013, Namibian exports to the EU exceeded 12 billion Namibia Dollars, while imports from the EU were below 10 billion Namibia Dollars, yielding a surplus of export earnings exceeding 2 billion Namibia Dollars. Notably, minerals and diamonds constitute a significant portion of the EU's import, accounting for 45.7% and valued at 609 billion euros in 2022[128].

Within the broader framework of development cooperation, the EU's engagement in Namibia is underpinned by a commitment to supporting Namibia's long-term development vision, "Vision 2030," translated into successive five-year development plans. The European Development Fund (EDF) serves as the conduit for this support, structured through a Multi-annual National Indicative Programme (MIP)[129].

Central to the EU-Namibia cooperation is the shared commitment to inclusive green growth, a pivotal priority within the MIP 2021-2027. Particularly, within this framework, the second priority area "Inclusive Green Growth" is aligned with the objectives of the EU Green Deal, the EU Strategy on Adaptation to Climate Change, the EU's Biodiversity Strategy for 2030 and the EU-Africa

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[127] Bols, A.; Du Pisani, A. & Zaire, D. (2014) *supra* 125.

[128] European Commission. (2023, April 19). *European Union, Trade in goods with Namibia*. Retrieved September 19, 2023, from https://webgate.ec.europa.eu/isdb_results/factsheets/country/details_namibia_en.pdf

[129] *Global Europe - Programming*. (n.d.). International Partnerships. https://international-partnerships.ec.europa.eu/funding-and-technical-assistance/funding-instruments/global-europe-programming_en

Alliance for Sustainable Investments and Jobs[130]. Within this priority area, *"the EU also envisages supporting Namibia in line with the EU Action Plan on Critical Raw Materials to promote sustainable practices in the mining sector, develop the raw materials value chains and promote its integration with the EU"*[131].

The culmination of these efforts foresees not only sustainable growth but also the creation of jobs, further echoing the overarching Team Europe initiative. In concert, the EU-Namibia relationship embodies the commitment to partnership, sustainable development, and shared prosperity on regional and global fronts.

3.3.1 EU-Namibia Partnership on Critical Raw Materials and Green Hydrogen

During the Sharm El-Sheikh climate change conference (COP27) Commission President Ursula von der Leyen and President of Namibia Hage Geingob signed a Memorandum of Understanding (MoU) establishing a strategic partnership between the European Union and Namibia[132].

There are two reasons why this partnership is considered peculiar compared to other agreements signed and promoted by the EU in the framework of mining diplomacy, especially in light of the recent impetus provided by the CRM Act. This partnership is the first of its kind that the Commission has signed with an African country. Additionally, it is a dual partnership covering critical raw materials and renewable hydrogen.

As a matter of fact, both Namibia and the EU are strongly committed to the green transition and in particular to a clean energy revolution. In this regard, for what concern the critical raw materials, the MoU is strongly committed in securing a sustainable supply of CRM, in order to deliver on green and clean energy objectives. However, the important point stressed here is that the development of

[130] European Commission. (2021). *Namibia Multi-Annual Indicative Programme* 2021-2027. In European Commission. Retrieved September 7, 2023, from https://international-partnerships.ec.europa.eu/system/files/2022-01/mip-2021-c2021-9055-namibia-annex_en.pdf

[131] Ibid.

[132] European Commission. (2022, November 8). *COP27: European Union concludes a strategic partnership with Namibia on sustainable raw materials and renewable hydrogen*. Retrieved September 8, 2023, from https://ec.europa.eu/commission/presscorner/detail/en/ip_22_6683

a sustainable value chain of critical minerals *"need to come along with strong commitments on environmental, social and governance standards (ESG)"*[133].

Indeed, as seen before, Namibia's economy is heavily dependent on the extraction and processing of mineral exports. This partnership aims to improve the sustainability of the mining industry and develop local processing and refining, recovery and recycling capacity, and has the potential to support sustainable, clean and inclusive growth across the value chain by deepening direct linkages with the rest of the economy, enabling economic transformation and diversification in Namibia.

Regarding the second leg of the MoU, the EU recognises renewable hydrogen as a crucial technology. Indeed, the EU aims to achieve carbon neutrality by 2050 and the share of hydrogen in its energy mix is expected to increase from 2% to 13% by 2050[134]. Within this strategic framework, Namibia, with its abundance of sunlight, proximity of seawater and wind power, is positioning itself as a renewable energy hub and thus a strategic partner. This is well represented in its ambitious plan, the Harambee Prosperity Plan II (HPPII), where renewable hydrogen is cited as a key factor for economic development[135]. In particular, the production and export of renewable hydrogen aligns with energy security objectives, diversifies the economy, attracts investment and creates jobs.

The overall objective of this partnership is threefold:

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[133] European Commission & Republic of Namibia. (2022, November 8). *Memorandum of Understanding on a Partnership on Sustainable Raw Materials Value Chains and Renewable Hydrogen between the European Union Represented by the European Commission and the Republic of Namibia.* In European Commission. Retrieved September 8, 2023, from https://single-market-economy.ec.europa.eu/system/files/2022-11/MoU-Namibia-batteries-hydrogen.pdf

[134] For more information see also *2050 long-term strategy*. (n.d.). Climate Action. https://climate.ec.europa.eu/eu-action/climate-strategies-targets/2050-long-term-strategy_en

[135] Republic of Namibia. (2021). *Harambee Prosperity Plan II (HPPII)*. In Ministry of Mines and Energy. Retrieved September 8, 2023, from https://www.namport.com.na/files/files/Harambee%20Prosperity%20Plan%20II(1).pdf

(i) to advance the value, security, and sustainability of trade and investment into resilient raw materials and downstream value chains across both Namibia and the European Union,

(ii) to support the development of renewable energy sources taking into account its contribution to energy security, as well as the impact on the environment and water resources in Namibia and the decarbonisation of the energy sector with a particular focus on renewable hydrogen's potential

(iii) to create a well-functioning renewable hydrogen market and promote new channels for investment and trade opportunities, and in cooperation between Namibia and the EU.

(iv) Moreover, the partnership contains six main pillars:

(v) Integration, where feasible, of (critical) raw materials and renewable hydrogen value chains.

(vi) Cooperation to leverage Environmental, Social, and Governance (ESG) Criteria and align with international standards.

(vii) Mobilization of funding for the development of soft and hard infrastructure required for projects development and for leveraging private sector funding.

(viii) Capacity building, training and skills development along raw materials and renewable hydrogen value chains.

(ix) Co-operation on research and innovation along the raw materials value chain, including on mineral knowledge and circularity, hydrogen technologies and skills.

(x) Regulatory alignment, particularly on hydrogen definitions, standards and certification.

3.3.2 Assessing the Current State of the EU-Namibia Partnership.

In earlier chapters, it has been emphasized the pivotal role of diplomacy in facilitating the European Union's engagement in discussions and collaborations with third countries regarding raw materials. This role of diplomacy remains equally significant within the context of this case study.

The context in which this agreement was signed was characterized by the presence of two key factors. On one hand, during the COP26 held in November 2021, the President of Namibia highlighted the strategic role that Namibia could

play in the field of green hydrogen. On the other hand, in the time that elapsed between COP26 and COP27, where the agreement was signed, the Russian invasion of Ukraine occurred, exposing vulnerabilities in certain European value chains that were disrupted or severely impacted by the event. This prompted the European Commission to urgently address the need to diversify and expand its sources of supply, leading it to seek new strategic and reliable partners.

However, despite this "favourable" context, it took significant diplomatic efforts from both sides to actually bring about the signing of the memorandum of understanding between the EU and Namibia. In particular, the success of the diplomatic endeavour stemmed from the ability to merge two pre-existing situations: the existence of a well-supported green hydrogen plan championed by the Namibian government and the EU's need to establish new partnerships on critical raw materials with resource-rich and dependable countries. What makes this partnership unique is, in fact, this duality: one cannot discuss a partnership related to critical raw materials without also considering the renewable hydrogen aspect. They are interdependent[136].

Furthermore, what allowed Namibia to be the first African country to sign this type of agreement was partly due to the positive relations it maintains with the EU, as previously described. It was no coincidence that Namibia seemed like an excellent option when the Commission decided to work on this type of partnership. As the EEAS Desk Officer for Namibia and Zimbabwe, Marcel Roijen, stated, *"I literally raised my hand and said, 'Let's do it with Namibia.' It is a country that, compared to others, already had a serious plan for hydrogen, which could be complemented by the discussion on critical raw materials. Moreover, unlike other countries like Zimbabwe, where it is difficult to make political decisions, Namibia immediately made itself available and open to dialogue. This does not mean that everything was easy; on the contrary, there were difficulties and delays in this case as well. Especially because, while green hydrogen is a new and highly promising sector, the mining sector has its own "history" that makes it ideologically and politically more sensitive. For a country like Namibia, which has historically leaned towards countries like Russia and China and notably abstained from voting against Russia's invasion of Ukraine in the UN*

[136] Cooperation Officer of the EU Delegation in Namibia, interviewed by the author. 5 September 2023

General Resolution[137]*, signing such a partnership means taking a step westward with all the political and ideological weight it carries. For this reason, in light of these additional factors, the diplomatic role played by both actors' diplomacy becomes even more relevant".*

However, the diplomatic effort did not conclude with the signing of the MoU. Currently, as reported by an Official from the EEAS Cooperation Office in Namibia, the delegation is working on creating and developing a Team Europe initiative, fostering coordinated action between the European Union, its member states and their stakeholders[138]. In fact, the primary goal of this memorandum, as emphasized once again by Roijen, is to encourage as much private investment as possible from European companies: *"If we continue to promote this action only through European institutions and mechanisms, it will take a long time, which could prove fatal given the significant delay with which the EU has arrived on this issue compared to other powers like China, whose presence in the country (as in many other Sub-Saharan African countries) is quite substantial. Instead, if we could deliver with the private sector tomorrow, it would allow us to 'beat' anyone."*

Indeed, what makes this partnership unique, both in relation to the EU's strategy on critical raw materials over the years, which we have seen has often lack of enough strength and commitment, and in comparison, to other countries like China, Australia, or Japan, is the idea of a sustainable alternative that aims to develop along the entire value chain. "*What I am seeing in Namibia is that China often comes and takes what it wants, on its own terms, using its resources and tools, its containers, and its labour force"*[139]. In contrast, the European Union's idea is to create added value in the country and establish a fair partnership in which both parties are on equal footing.

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[137] For more information see also Melber, H. (2022, March 9). *Why Namibia's vote on Russia violates its foreign policy principles*. Namibian Sun. Retrieved September 13, 2023, from https://www.namibiansun.com/opinion/why-namibias-vote-on-russia-violates-its-foreign-policy-principles2022-03-09-6117; and Masih, N. (2023, February 24). *U.N. resolution to end Ukraine war: How countries voted and who abstained.* Washington Post. Retrieved September 13, 2023, from https://www.washingtonpost.com/world/2023/02/24/un-ukraine-resolution-vote-countries/

[138] Cooperation Officer of the EU Delegation in Namibia, interviewed by the author. 5 September 2023

[139] Marcel Roijen, EEAS Desk Officer Namibia and Zimbabwe, interviewed by the author. 30 August 2023

In this regard, it has been reported from the EEAS Official in Namibia that there are significant developments, especially concerning renewable hydrogen. The European Union is positioning itself as *"a strategic partner aiming to assist Namibia in becoming a frontrunner and a pioneer in the field of green hydrogen."* Currently, there seem to be some major projects involving European companies from countries such as Germany, France, and the Netherlands.

Firstly, in 2022, the EU delegation already helped Namibia's Minister of Energy publish a tender to identify potential investors in the hydrogen sector. Among them, Hyphen Hydrogen Energy, a company with English and German shareholders, signed an agreement worth $10 million with the Namibian government in May 2023 regarding green hydrogen[140]. This amount is nearly equal to Namibia's entire GDP and could lead to the creation of approximately 15,000 jobs in the country. Other companies like Compagnie Maritime Belge (CMB) and Hydrogen de France (HDF) are also initiating pilot projects rather than power plants[141].

These are all projects that can be considered strategic and are promoted under the 'umbrella' of the Global Gateway Plan. They are expected to attract private investments and generate job opportunities, making the underlying principle of this partnership concrete: the ability to develop the entire value chain in a sustainable manner. The strong presence of the European Union is thus demonstrated by what has been mentioned so far, both in terms of the role of a strategic partner it is carving out and the presence of European companies willing to invest in the country. Similarly, it also signifies the direct involvement of

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[140] Roelf, W. & Nyaungwa, N. (2023, May 25). *Hyphen and Namibia agree next phase of $10 billion green hydrogen project*. Reuters. Retrieved September 13, 2023, from https://www.reuters.com/business/energy/hyphen-namibia-agree-next-phase-10-bln-green-hydrogen-project-2023-05-24/

[141] For more information see also Hydrogen Economy. (2022, April 11). *CMB Starts Ambitious Hydrogen Project in Namibia*. Hydrogen Central. Retrieved September 13, 2023, from https://hydrogen-central.com/cmb-starts-ambitious-hydrogen-project-in-namibia/; and Samodien, T. (2023, September 1). *HDF to Develop Green Hydrogen Power Plant in Namibia*. Energy, Capital & Power. Retrieved September 13, 2023, from https://energycapitalpower.com/hdf-green-hydrogen-power-plant-namibia/#:~:text=Hydrogen%20development%20firm%20Hydrog%C3%A8ne%20de,will%20be%20located%20in%20Swakopmund.

countries like Germany, the Netherlands, and Belgium, which is closely collaborating with the Namibian government to expand the Walvis Bay port, equip it with hydrogen terminals, and facilitate direct communication with the ports of Antwerp and Bruges. Similarly, the port of Rotterdam is advancing a project in cooperation with the Lüderitz port in the south of the country[142].

This is at least concerning the hydrogen aspect. When it comes to critical raw materials, the situation differs because it's a sector with significant economic, historical, and social value. In this case, what is missing is a more prominent role for European institutions and financing mechanisms like the European Investment Bank.

Indeed, the CRM legislative proposal doesn't include dedicated financing instruments. The establishment of a dedicated CRM fund had been considered by the Commission during the negotiation phases but was ultimately not included in the final CRM Act proposal[143]. Especially when it comes to funding frameworks for investments in African countries, the Commission's proposal primarily relies on the use of existing Union-level financing tools, notably the European Fund for Sustainable Development Plus (EFSD+) for mobilizing investments within the Global Gateway strategy[144].

The funds and investment tools within the Global Gateway do not explicitly target the development of CRM value chains, but instead identify five priority areas that go beyond CRM. For this reason, according to Elisabetta Sartorel Policy Officer at the DG INTPA, "it is unlikely that they alone can provide all the necessary investments in this area".

In particular, concerning the European Investment Bank, what would make a real difference is if the CRM Act stated that the Bank can invest in Third

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[142] Cooperation Officer of the EU Delegation in Namibia, interviewed by the author. 5 September 2023

[143] European Commission. (2023, March 16). *Impact Assessment Report Accompanying the Proposal for a Regulation Establishing a Framework for Ensuring a Secure and Sustainable Supply of Critical Raw Materials*. In European Commission. Retrieved September 13, 2023, from https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52023SC0161

[144] Münchmeyer, M. (2023, August 1). *Strategic Security and Critical Raw Materials: The Role of the European Investment Bank*. Istituto Affari Internazionali (IAI). https://www.iai.it/sites/default/files/9788893683036.pdf

Countries by providing loans in the mining sector, which is not the case because it lacks a mandate in this area[145]. Indeed, in the CRM legislative proposal, the only instance where the Bank is attributed a role in the law, rather than in the recitals, is as part of the Critical Raw Materials Board, which brings together national, European, and international financial institutions to discuss and coordinate the financing of strategic projects[146].

This is evidently a significant limitation compared to what could be the role of the EIB in promoting the external CRM strategy, which it is doing more prominently in the case of green hydrogen, having signed a letter of intent for a framework loan of 500 million euros at COP27[147]. However, this does not mean that there is no commitment from the EIB to *"support the development of sustainable critical raw materials supply",* as indicated in its current energy lending policy[148].

Therefore, even though there may seem to be an actual imbalance in favour of hydrogen between the two axes that constitute this EU-Namibia partnership, efforts to promote and strengthen the critical raw materials strategy remain significant. For example, the EU in Namibia Officer said that the MIP 2021-2027, which is the main framework for cooperation between the European Union and Namibia, will soon be revised during the mid-term review precisely to increase the funds allocated to the critical commodities strategy. Furthermore, according to him and the Policy Officer of the DG INTPA, the EU-Namibia Road Map, which should have been developed within the first six months after the signing of the MoU, has finally been approved and will be officially presented at the Global Gateway Forum in Brussels in October, where the partnership with Namibia will play a leading role as an example of future partnership. According to these sources some priority areas have been identified in this working document, such as:

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[145] Elisabetta Sartorel, Policy Officer at the European Commission DG International Partnership, interviewed by the author. 15 September 2023.

[146] Münchmeyer, M. (2023, August 1), *supra* 143.

[147] For more information see also *EIB to support green energy in Namibia*. (2022, November 16). European Investment Bank. https://www.eib.org/en/press/speeches/cop27-namibia-mou-hoyer

[148] European Investment Bank. (2023, May 8). *EIB energy lending policy*. In European Investment Bank. Retrieved September 13, 2023, from https://www.eib.org/attachments/lucalli/20230164_eib_energy_lending_policy_en.pdf

(i) Business and cooperation: EU is looking for companies in Namibia that might want to join the GG Forum in October where b2b meeting are supposed to take place.
(ii) Capacity and knowledge transfer: facilitating the cooperation between the geological survey conducted by European countries such as German and Finland, and Namibians.
(iii) Skills and development: with bilateral fund the EU and Namibia are prompt to create cooperation between universities and tertiary institution with programs like Erasmus+ and Horizon EU.
(iv) Financing: the projects suggested in this partnership are considered to be of a high capital cost. Thus, the EU and Namibia are willing to create financial instruments that can reduce the risk and initial cost of such investments.
(v) Off take agreements: the partnership's aim is to link Namibian companies to EU potential investors and off-takers through the cooperation with the European Raw Material Alliance and the European Battery Alliance, which unite EU companies along the entire raw materials value chain.
(vi) Common user infrastructure: as a part of the Strategic Corridor Plan, 100 million euros have been allocated specially on the Maputo-Walvis Bay corridor, in order to implement the level of connectivity with highway and railways, as well as to invest in the expansion and modernisation of the two most important Namibian harbour, Walvis Bay and Lüderitz, which might be able to promote a better connection with European harbour such as Antwerp or Rotterdam[149].

So, to begin wrapping up this lengthy and intricate discussion, it is evident that the European Union is currently making a tremendous effort to make this external action towards the creation of resilient and sustainable value chains for raw materials as concrete as possible. It's clear that there's a lot at stake; this involves achieving significant and ambitious objectives as outlined in the Green Deal and the CRM Act. Despite some limitations that this action seems to present at the moment, as we discussed earlier, it's evident that, at the very least, with initiatives like the CRM Act and the Global Gateway, there is a strong

[149] Cooperation Officer of the EU Delegation in Namibia, interviewed by the author. 5 September 2023

commitment from the European Union to present itself as a strategic yet reliable partner with which to forge equitable agreements.

The European Union, in fact, carries a significant historical legacy in the African continent compared to other economic powers like China. This historical legacy, as it has been mentioned in the interviews as well, is still somewhat perceptible in the skepticism encountered when negotiating with African countries and their leadership. Namibia itself displayed some hesitations during the formation of this partnership, which were overcome and resolved through the diplomatic efforts mentioned above. This further underscores the significance and interest in what the EU and Namibia are currently doing, looking not to the past but to a shared future, both concerning hydrogen and raw materials.

To conclude, as was also recently reiterated by Gosia Lachut Deputy Head of Mission, European Union in Namibia at the Namibia Mining Conference that took place in Windhoek on the 31 August 2023, this is a crucial moment for both Namibia and the EU. The Memorandum of Understanding has been only the beginning of a long journey that has everything in place to collectively achieve the ambitious goals set to build a more sustainable and resilient future for both Namibia and the EU. The fact that the first-ever EU-Namibia Business Forum on Green Hydrogen and Critical Raw Materials will be held in Brussels in October 2023 underlines the importance of the moment but also the relevance of this precise partnership within the broader external action that the EU is promoting on these issues. It will be an opportunity to understand what has been achieved so far, and to show to other partners the potential this agreement. At the same time, it will bring together public and private sector actors in the field of investment, trade and finance to network, exchange experiences and explore sustainable and win-win business opportunities for Namibian and European companies to further advance this joint effort.

CONCLUSIONS

The pursuit of this thesis was to investigate the diplomatic effort undertaken by the European Union in promoting a strategy on raw material, from the very first steps it took in this field until the most recent update namely the Critical Raw Material Act. For this reason, the partnership with Namibia was chosen as a case study due to its encapsulation of both a strategic partnership under the framework of the CRM Act and a flagship of the Global Gateway Plan, the EU new "global connectivity" project.

Drawing upon policy papers, regulations, and academic discourse, it has been provided a framework for comprehending the evolving landscape. In particular, this research has sought to achieve a deeper understanding of how the European Union has progressively acknowledged the imperative of establishing sustainable and resilient critical raw material supply chains as a strategic prerequisite for realizing the green transition.

Subsequently, with the direct contribution of policymakers and members of the EU External Action Service and the EU Commission, has been possible to have a deeper look into one such partnership- the EU-Namibia Partnership on Renewable Hydrogen and Critical Raw Materials. This partnership signifies the EU's quest to secure access to critical minerals through Namibia, all while fostering economic and social development in a nation where the mining sector plays a pivotal role.

Nearly a year after the signing of the Memorandum of Understanding between the EU and the Government of Namibia, it is possible to underline its notable successes, acknowledge its limits to date, and contemplate the broader potential. of partnership of this kind.

As a matter of fact, Namibia stands as a shining exemplar of strategic partnerships. Indeed, when it was signed in December 2022 it marked the first of this kind with an African nation, uniquely encompassing both green hydrogen and critical raw materials. This reflects the EU's unwavering commitment to renewable energy.

According to the interviews run by the author of this thesis it is undeniable the effort showed by the Commission in promoting a serious external action where sustainability and equality are its main pillars. The EU is taking a step forward in this respect, by proposing itself as a concrete reliable partner for all those countries that might be interested in

tightening relationship with it. Indeed, this might be seen through the several strategic partnerships that have been announced in the meantime strengthening and the broadening the EU commitment towards diverse geographic areas (Chile, Argentina, Zambia, and DRC just to mention a few) and domains (CRM value chain, green hydrogen, renewable energy, solar plant, etc.)

In this way EU is facing both external and internal challenges. Indeed, it positions itself as a compelling alternative to Chinese investment in developing countries, promising sustainability along all the entire value chain and at the same time it provides for the diversification of its own supply sources to reduce dependency on China.

The most important initiative that has been undertaken by the EU lies in fostering an enabling economic environment to attract private investments from European companies. Therefore, this represent a shift away from traditional aid-based approaches towards developing countries and create the ground for a real equal partnership where investment comes just because are interested in the potential outcomes and at the same time might help creating local added value, fostering a perfect "win-win" situation.

The current landscape lacks a major role played by institutions such as the European Investment Bank, that misses a defined mandate in the raw material sector. The mineral sector, specially from the point of view of European investors, remain a high-risk business due to Environmental and social concerns, human rights issues, political instability, and decision-making difficulties in partner governments.

However, as mentioned by the EU Officials competent for the Namibia Office there are signs of change thanks to investments and interests coming from some Member States as well as some European companies. At the same time, the first-ever EU-Namibia Global Gateway Forum to be held in Brussels in October 2023 underlines the importance of the moment but also the relevance of this precise partnership. Indeed, the most important thing that this partnership can do it setting the lead for the future agreements that will come.

In conclusion, this exploration of the EU's diplomatic efforts in the realm of raw materials strategy, as exemplified by the EU-Namibia partnership, illuminates a path toward more sustainable and equitable global partnerships. It marks a paradigm shift from traditional aid to mutually beneficial collaborations, driven by a commitment to sustainability and a shared vision of progress. While challenges persist, this partnership, among others, represents a promising step toward realizing the EU's ambitious goals in the green transition and critical raw materials security. It sets the tone for a future where diplomacy,

sustainability, and mutual benefit converge on the global stage.

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