

POLICY BRIEF

Raw Material Partnerships and What They are (still) Missing

Challenges for a level cooperation on equal terms

Securing the supply of raw materials for Germany and Europe has been the subject of intense economic policy debate for several years now and is currently becoming more prevalent again.¹ Energy and mobility transition – in particular – is based on the planned expansion of technologies that are very material-intensive in terms of certain metals and minerals. Raw materials such as lithium, cobalt, rare earths and copper are key components of batteries, wind turbines, solar panels and modern storage solutions and are considered essential for achieving climate targets. The current high demand is leading to increased competition on the world market for so-called critical raw materials, which are also of central importance to the European economy and industry. Moreover, geopolitical tensions are leading to increased global competitive pressure for certain mineral raw materials on the world market. Dependence on imports and an insufficiently diversified range of trading partners further amplify uncertainties regarding supply security.²

To counteract these developments, both Germany and the EU are striving to diversify their sources of supply, particularly for critical raw materials – not least to reduce the worrying dependence on China. China not only dominates the market for affordable electric cars, but also has a virtual monopoly on the export of rare earths, which play an important role in the expansion of wind power and photovoltaics, among other things. In addition, around 70% of the batteries used worldwide in 2024 were produced in China.³

Against this backdrop, Germany and the EU are planning to tap into new sources of raw materials and expand existing trade relations with alternative partners. A range of trade policy instruments is available for this purpose, including the so-called ‘raw material partnerships’ that are being established at both the German and European levels. These partnerships are intended to help deepen trade relations with resource-rich countries and thereby increase security of supply. In return, the partner countries have been assured support, for example in expanding value creation, and the prospect of increased investment from Germany and the EU in the relevant sectors. There are currently three such partnerships at the German level⁴ and 14 EU partnerships with third countries in the form of memoranda of understanding (MoUs)⁵. What they all have in common is that so far, they have only partially fulfilled expectations.

¹ BMW, 2025, [Gemeinsam für Resilienz: Bündnis Zukunft der Industrie legt gemeinsames Positionspapier zur Sicherung kritischer Rohstoffe](#) (last accessed: 06. December 2025).

² Müller, 2025, [Die Geopolitik globaler Lieferketten](#), p. 8 (last accessed: 06. December 2025)

³ Hille, 2025, [Trotz Milliardenmarkt für EV-Batterien droht Europa den Anschluss zu verlieren](#) (last accessed: 06. December 2025); Spiegel, 2025, [China bremst Export Seltener-Erde-Magnete](#) (last accessed: 06. December 2025).

⁴ Korn, Gohla und Dünhaupt (FES), 2024, [Rohstoffpartnerschaften Spannungsfeld zwischen Menschenrechten, Transformation und wirtschaftlicher Souveränität](#) p. 8 (last accessed: 06. December 2025).

⁵ Kuhn, 2025, [Strategische Rohstoffe in der EU: Was bringen die Partnerschaften mit Drittländern?](#) (last accessed: 06.12.2025); Schulze, 2025, [The Strategic Raw Material Partnership between the EU and Zambia](#), p. 2 (last accessed: 06. December 2025).

1 Classification in terms of raw materials policy: the purpose of partnerships and their results

German raw materials partnerships were established in the context of the German raw materials strategy in 2010, with Mongolia becoming the first partner country in 2011. In the following years, further partnerships were agreed with Kazakhstan and Peru as well as with Chile.⁶

The partnerships have primarily been set up to secure access to critical raw materials for German industry by removing trade barriers and improving investment conditions for German companies, while the partner countries should benefit from higher investment sums and new projects.⁷ The programme also aims to support partner countries in capacity building, knowledge transfer and technology development in order to achieve mutual benefits and promote sustainable development locally.⁸

Initially, the new raw materials policy instrument received a great deal of attention. As early as 2016, the effectiveness of the partnerships⁹ was analysed as part of a comprehensive study. It concluded that the instrument was only effective to a limited extent and that significant improvements were necessary – in particular due to the lack of concrete commitments, for example with regard to investments.¹⁰ Another key shortcoming of previous agreements is the lack of binding measures to prevent environmental damage or protect the rights of indigenous people, who are severely affected by the negative consequences of mining in some partner countries and are considered particularly vulnerable, as is the case in Peru, for example. The responsibility of investing companies to comply with certain environmental and social standards has so far largely been regulated on a voluntary basis. Partner countries also often have weak institutions, necessitating binding means of enforcing sustainability standards.¹¹

In view of increasing dependencies on individual raw material trading partners in the coming years, the EU has once again taken up the instrument of strategic raw material partnerships. Notably within the framework of the Critical Raw Materials Act (CRMA) – a key EU instrument that has been in force since 2024 – the aim is to increase the security of supply of critical raw materials. The CRMA sets clear targets: by 2030, no more than 65% of a strategic raw material should come from a single third country. At the same time, the EU also wants to expand its own raw material extraction, processing and recycling.¹² Strategic raw material partnerships are seen as a building block for achieving this goal. According to Article 37 of the CRMA, they serve to spread risks in raw material supply, avoid supply bottlenecks and intensify cooperation with raw material-rich third countries. In return, partner countries should benefit from technological cooperation, economic development and the promotion of sustainability in their countries.¹³

⁶ Korn, Gohla und Dünhaupt (FES), 2024, [Rohstoffpartnerschaften Spannungsfeld zwischen Menschenrechten, Transformation und wirtschaftlicher Souveränität](#) p. 7 (last accessed: 06. December 2025).

⁷ BMWI, 2010, [Rohstoffstrategie der Bundesregierung](#), p. 24 (last accessed: 06. December 2025).

⁸ Adelphi, 2016, [Die deutschen Rohstoffpartnerschaften - Analyse der Umsetzung und Ausblick](#), p. 11 (last accessed: 06. December 2025); [Deutscher Bundestag Drucksache 18/9427](#) (last accessed: 06. December 2025).

⁹ Dahlmann und Mildner (KAS), 2013, [Deutschlands Rohstoffpartnerschaften: Modell mit Zukunftsscharakter?](#) (last accessed: 06. December 2025).

¹⁰ Adelphi, 2016, [Die deutschen Rohstoffpartnerschaften - Analyse der Umsetzung und Ausblick](#) (last accessed: 06. December 2025).

¹¹ Urrutia, 2014, [Deutsch-Peruanisches Rohstoffabkommen II: Risiken und Nebenwirkungen](#) (last accessed: 06. December 2025).

¹² Cavazzini (HBS), 2023, [Der Critical Raw Materials Act: Eine Alternative zu globalen Abhängigkeiten?](#) (last accessed: 06. December 2025).

¹³ Kuhn, 2025, [Strategische Rohstoffe in der EU: Was bringen die Partnerschaften mit Drittländern?](#) (last accessed: 06. December 2025).

The issue was taken up again at the German level in 2023: In its position paper ‘Paths to a Sustainable and Resilient Supply of Raw Materials’, the Federal Ministry for Economic Affairs and Climate Protection (BMWK) formulated the goal of concluding bilateral and multilateral partnerships to secure raw materials. In particular, cooperation should be intensified with countries recognised by the German government as ‘value partners’. Long-term incentives should be created, for example by promoting local value creation and strengthening industrial capacities in raw material-exporting partner countries.¹⁴ However, there were no concrete details on how these incentives would be structured, meaning that the previously criticised non-binding nature of the commitments remained unchanged. Germany has not formed any new partnerships since. In response to a minor parliamentary question the same year, the Federal Government stated that it did not intend to expand the model of raw materials partnerships.¹⁵

The new federal government is clearly pursuing a different approach at this point. In the 2025 coalition agreement it stated that ‘Our goal is [...] to diversify raw material imports and conclude trade and raw material partnerships on equal footing.’¹⁶ This underlines the ongoing or even increasing concern for security of supply and resilient supply chains – and thus, the need for effective raw materials policy instruments. In this context, there is much to suggest that greater focus will once again be placed on raw material partnerships. However, the question arises as to whether the mistakes of the past can be avoided in the future.

2 Partnerships on equal terms – an achievable goal?

Despite initial interest from German companies, the partnerships established to date have failed to meet expectations both at the German and European level. German and European companies considered many projects unattractive due to high risks, insufficient financing options and limited legal certainty. Furthermore, the agreements and MoUs mostly contained only general declarations of intent rather than concrete targets. They were limited to non-binding statements on the promotion of investment, without specifying concrete sums or projects so that the anticipated investments in the partner countries ultimately failed to materialise. Since economic interests and specific supply targets are clearly at the forefront of the agreements, sustainability goals could hardly be pursued. This would have required clearly formulated goals and closer integration with development policy measures. So far, there has not been any reliable commitment to support the development of local value creation.¹⁷

In October 2025 the BMZ presented its action plan ‘Strong partnerships for a successful global economy’, which declares cooperation with German industry as a strategic priority of development cooperation. This could shift the priorities of development cooperation, particularly in the collaboration with resource-rich countries. The interests of trade associations and companies should therefore be given greater consideration in development cooperation measures, and economic actors should be more closely involved in development policy projects. Securing raw materials for the German economy is an important factor in this context. Although this does not exclusively concern the raw materials sector, the supply of raw materials is explicitly addressed.

¹⁴ BMWK, 2023, [Eckpunktepapier des Bundesministeriums für Wirtschaft und Klimaschutz \(BMWK\): Wege zu einer nachhaltigen und resilienten Rohstoffversorgung](#), p.9 (last accessed: 06. December 2025).

¹⁵ Deutscher Bundestag, 2023, [Drucksache 20/9096](#), p. 14 (last accessed: 06. December 2025).

¹⁶ Bundesregierung, 2025, [Verantwortung für Deutschland Koalitionsvertrag zwischen CDU, CSU und SPD](#), p. 10 (last accessed: 06. December 2025).

¹⁷ Carry, 2025, [Raw Materials Partner Chile: More Than Just a Supplier](#) (last accessed: 06. December 2025); Troester, Papatheophilou und Kueblboeck, 2025, [Kritische Rohstoffe für die EU Rohstoffpartnerschaften auf dem Prüfstand](#) (last accessed: 06. December 2025).

Among other things, the aim is to examine how private-sector investment in raw material supply chains in Africa, Latin America and Asia can be supported in order to ‘reduce risks and promote local value creation’. The goal is to create socially and ecologically sustainable supply chains and to pursue a ‘win-win approach, taking into account both the interests of partner countries and German interests.’¹⁸ Given the criticism levelled at the design of raw materials partnerships to date, this approach initially seems sensible. In order to establish partnerships on an equal footing that actually benefit the population, greater consideration must be given to local value creation. This is particularly important because resource-rich partner countries in the Global South often have a development model that is heavily dependent on raw materials, focused primarily on the export of primary commodities and providing little infrastructure that would enable the targeted expansion of local value creation without further measures. Future partnerships must therefore offer concrete support for the development of appropriate infrastructure.

For a partnership on equal terms, it is just as crucial that social and sustainability standards are bindingly established and adhered to¹⁹. The high-risk mining sector is particularly prone to environmental destruction and human rights violations. In the partner country Peru, for example, mining waste regularly causes environmental damage, the displacement of indigenous populations and attacks on human rights defenders. Expanding mining without accompanying measures to protect the environment and human rights, threatens to exacerbate existing problems and increase inequality for the local population.²⁰ To prevent this, binding commitments are needed on knowledge and technology transfer to train local specialists and use more environmentally friendly technologies. At the same time, civil society must be involved in the concrete implementation and the participation of the (local) population must be strengthened. The measures must be designed in such a way that they actually benefit the local population – which requires appropriate support – and are not implemented exclusively by economic actors. However, in view of the recent announcements of closer integration of German economic interests with development policy instruments, there is concern that economic goals could take precedence in project development, while development policy goals take a back seat.²¹

¹⁸ BMZ, 2025, [Starke Partnerschaften für eine erfolgreiche Wirtschaft weltweit](#), p. 3 (last accessed: 06. December 2025).

¹⁹ Lobacheva and Sedova, 2024, [The Kazakhstan–EU partnership on Critical Raw Materials](#) (last accessed 19. December 2025)

²⁰ Powershift, 2025, [Erz gesucht Amazonas verloren warum Klimapolitik und Rohstoffwende zusammenhängen](#), S. 3 (last accessed: 06. December 2025).

²¹ BMZ, 2025, Aktionsplan [Starke Partnerschaften für eine erfolgreiche Wirtschaft weltweit](#), p. 3 (last accessed: 06. December 2025); Stier (Brot für die Welt), 2025, [BMZ-Aktionsplan – Wirtschaftsinteressen im Fokus](#), (last accessed: 06. December 2025).

3 Outlook and recommendations

Although strategic raw material partnerships have been used as an instrument for over a decade, they have so far failed to live up to expectations. In order to achieve the goal of partnerships ‘on equal terms’, a one-sided focus on the economic interests of Germany and the EU is not enough. Rather, binding offers must be made to partner countries that take into account the needs of the local population. These include:

- systematic promotion of concepts for local value creation and infrastructure development in partner countries, ensuring long-term benefits for the local population;
- setting binding and measurable targets in partnerships for sustainable development and compliance with social and environmental standards;
- strengthening participatory processes by involving partner countries’ civil society in project design;
- introducing binding and effective programmes for knowledge transfer and technology promotion in order to support skilled workers and environmentally friendly technologies;
- equipping partnerships with clear control and evaluation mechanisms to ensure transparency and traceability.

In order to counteract China's dominance in the raw materials sector, partner countries must be offered more than just the prospect of higher investment in the mining sector. A key component of genuine raw materials partnerships is the creation of local value-added opportunities that actually benefit the local population, while at the same time establishing and adhering to strict environmental standards. In order for the German government and the EU to live up to their claim of ‘equality’ in raw materials partnerships, existing partnerships should be improved and future ones should be designed accordingly from the outset.

Authors: Svenja Schöneich

Translation: Rachel Hinterthan-Nizan

Edited by: Nikola Klein

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Germanwatch e.V.

Office Bonn

Kaiserstr. 201

D-53113 Bonn

Phone +49 (0)228 / 60 492-0, Fax -19

Website: www.germanwatch.org

Office Berlin

Stresemannstr. 72

D-10963 Berlin

Phone +49 (0)30 / 5771 328-0, Fax -11

E-mail: info@germanwatch.org

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