

The EU Global Gateway, Critical Minerals, and Conflict Dynamics in Africa

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Acknowledgments

This research is an output from the Research Unit of Conflict Management Consulting (CMC). The information and views set out in this publication are those of the authors. Any use of this work should acknowledge the authors and CMC.

Thanks are due to: Pacifique Zikomangane for helping to frame the research and for providing valuable local contacts; Tim Midgley for the insightful reading and comments on earlier versions of this report; and to Tamara Larter for copy editing and production work.

Key points

- Critical raw materials (CRMs), including cobalt, copper, lithium, and rare earth elements, are front and centre of the EU Global Gateway initiative, the green transition, and geopolitical competition.
- Flagship projects, such as the Lobito Corridor, test the EU's ability to align infrastructure investment, green energy transition and geostrategic objectives with conflict-sensitive and inclusive development.
- In minerally rich but fragile and conflict-affected countries, such as the Democratic Republic of the Congo (DRC), large-scale infrastructure and extractive investments actively reshape the political and social contexts in which they operate. Without robust conflict sensitive safeguards, these investments risk exacerbating inequalities, corruption, exclusion of local actors, and human rights violations, thereby fuelling further conflict.
- Across three main pathways — land acquisition and displacement, unequal benefit distribution, and the involvement of armed actors — exclusionary governance and inadequate community engagement function as risk multipliers.
- There are still gaps in oversight, coordination, and transparency affecting the Global Gateway and flagship projects such as the Lobito Corridor. Uneven access to information, elite capture, and the marginalisation of affected communities are real risks they face.
- Despite EU norms, regulations and policy positions related to CRMs that include commitments to conflict sensitivity, policy and practice are not aligned. The implementation of norms and commitments faces barriers spanning commercial and political demands, externalisation of risks, geopolitical pressures and lack of incentives.
- Global Gateway emphasises coordination within “Team Europe”, but in fragile settings this is not enough. What is needed is co-governance: a shared approach in which EU institutions, governments, investors, civil society, and local communities all play a real role in decision-making, oversight, and adapting projects over time.
- There is a need for stronger evidence grounded in local realities. Future research should closely monitor whether Global Gateway CRM investments reduce or worsen conflict risks, how investors can be encouraged to be more conflict sensitive, whether Global Gateway leads to different results than other infrastructure initiatives, and how PeaceTech tools can help to better track impacts on stability, inclusion, and resilience.

1. Introduction: From Development Aid to Geostategic Investment

The European Union's Global Gateway, launched in 2021, signals a shift from traditional development cooperation towards geostategic investment in infrastructure, energy, and digital connectivity sectors.¹ While earlier EU external action prioritised poverty reduction and broader development outcomes, Global Gateway aims to be a win-win for the EU and its partners by boosting “smart, clean and secure links in digital, energy and transport sectors”, while also strengthening “health, education and research systems.”²

This reorientation is taking place amid intensifying geopolitical competition. China's Belt and Road Initiative (BRI) has significantly reshaped global infrastructure finance, while wars in Ukraine and the Middle East have exposed fragilities in global energy systems. Together, these dynamics have pushed energy security and supply chain resilience to the forefront of EU policy. The EU positions Global Gateway as a values-based alternative to other global infrastructure initiatives, emphasising transparency, sustainability, and high governance standards.

At the centre of this agenda lie critical raw materials (CRMs) — including cobalt, copper, lithium, and rare earth elements — that are essential for electric vehicles, batteries, solar panels, wind turbines and other technologies needed for the transition from a fossil-based energy system. In response to increasing supply chain vulnerabilities, the EU Critical Raw Materials Act,³ which came into force in 2024, aims to ensure a secure and sustainable supply of CRMs, while the RESourceEU Action Plan⁴ of December 2025 seeks to speed up the diversification of the EU supply chains.

The Lobito Corridor — a 1,300 km transport infrastructure linking Zambia's Copperbelt and mineral-rich regions of the DRC to Angola's Atlantic coast — encapsulates these dynamics. Promoted as a flagship Global Gateway initiative, it offers both significant economic potential and a critical test of the EU's ability to align green energy transition and geostategic objectives with rights-based, conflict-sensitive and inclusive development.

Using the Lobito Corridor as a case study, this article examines how Global Gateway investments interact with local political economies, private sector incentives, and financial structures. It explores whether, and under what conditions, the EU can translate its commitments to conflict sensitivity into operational practice. The paper identifies key risks and trade-offs, proposes a research agenda to better understand conflict-sensitive investment, and highlights the potential of structured dialogue and co-governance platforms to align mineral supply security with sustainable peace and inclusive development.

For this analysis, a literature review of secondary sources related to Global Gateway and CRMs in Africa, including a vast array of official documents, specialist publications, scholarly writings and international media reports, was combined with primary-source data acquired

¹ European Commission (2021). *Joint Communication to the European Parliament, the Council, the European Economic and Social Committee, the Committee of the Regions and the European Investment Bank - The Global Gateway*. https://www.eeas.europa.eu/sites/default/files/joint_communication_global_gateway.pdf?utm_

² European Commission (2026). *Global Gateway Overview*. https://international-partnerships.ec.europa.eu/policies/global-gateway/global-gateway-overview_en

³ Official Journal of the EU (2024). *REGULATION (EU) 2024/1252 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 11 April 2024*. https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=OJ:L_202401252

⁴ EU Commission (2025). *RESourceEU Action Plan*. https://single-market-economy.ec.europa.eu/document/download/e9ac2181-0dc7-4e61-a964-ba0a39c2aea8_en

through six semi-structured interviews with civil society experts in the DRC and the representative of one company engaged in copper/cobalt value chains.

2. The Global Gateway and the Politics of Critical Minerals

Global Gateway aims to mobilise more than €400 billion in investment by 2027⁵ through a combination of EU grants, development finance, and private capital, under a “Team Europe” approach. This model brings together EU institutions, Member States’ development agencies, public development banks, other development finance institutions (DFIs), and private sector actors. It prioritises sectors central to European strategic autonomy: transport, energy, digital infrastructure, and raw materials.

The initiative seeks to “create links, not dependencies”⁶ and to strengthen the “competitiveness and security of global supply chains”,⁷ highlighting how infrastructure investment can translate into geopolitical influence at the project level. This narrative positions Global Gateway as a normative alternative to competing models, particularly China’s BRI.⁸

Africa has become central to this strategy, hosting a significant share of global CRM reserves and emerging as a key partner in efforts to diversify supply chains. European engagement is increasingly articulated in strategic terms, with leaders emphasising the need for sustained partnerships and warning against “leaving the continent to others.”⁹

The Lobito Corridor Flagship Project, advanced under the Global Gateway, exemplifies this approach. Backed by substantial financing from the EU, its Member States, the United States, and the African Development Bank, the project is expected to increase export capacity from the Copperbelt of the DRC and Zambia to one million tonnes of copper annually by 2030.¹⁰

Framed as a sustainable and mutually beneficial investment, it is also intended to reshape existing supply-chain structures — particularly by reducing reliance on Chinese-controlled segments of the value chain. Yet in practice, disentangling from China is likely to prove far more difficult: Chinese firms retain a strong commercial and operational presence along the corridor, while the interdependence of European and Chinese businesses across mineral value

⁵ European Commission (2025). *President von der Leyen announces Global Gateway has reached its €300 billion investment target building smart, clean links around the world.*

https://ec.europa.eu/commission/presscorner/detail/en/ac_25_2346

⁶ European Union External Action (2021). *The EU’s Global Gateway: creating links, not dependencies (with Jutta Urpilainen).* https://www.eeas.europa.eu/eeas/eu%E2%80%99s-global-gateway-creating-links-not-dependencies-jutta-urpilainen_en

⁷ European Commission. *Global Gateway.* https://commission.europa.eu/topics/international-partnerships/global-gateway_en

⁸ European Commission (2021). *State of the Union 2021.*

https://ec.europa.eu/commission/presscorner/api/files/document/print/en/speech_21_4701/SPEECH_21_4701_EN.pdf?utm_

⁹ ZDF (2025). *Europa und Afrika wollen Partnerschaft vertiefen.*

https://www.zdfheute.de/politik/ausland/eu-afrika-gipfel-angola-migration-wirtschaft-100.html?utm_

¹⁰ Chabala, W. and Hofmeyr, J. (2025). *A game changer in flux: recent developments and risks in the Lobito corridor.* Africa Policy Research Institute (APRI). <https://afripoli.org/a-game-changer-in-flux-recent-developments-and-risks-in-the-lobito-corridor>; Hancock, A., Dubois, L., and Foy, H. (2025). *EU foreign aid takes transactional turn with Africa minerals push.* Financial Times. <https://www.ft.com/content/2de1ae2d-e6c9-47b6-b7e4-e7eb64cfa53b?syn-25a6b1a6=1>

chains limits the feasibility of any clear-cut separation.¹¹ Interviews with civil society experts also emphasise a limitation in current responsible sources arrangements: many critical minerals do not enter European markets directly from fragile and conflict affected states, but via intermediary processing and trading channels. Minerals extracted and exported under abusive conditions may be processed elsewhere¹² and then re-enter the global supply with reduced controls. In this sense, systems of due diligence that focus primarily on direct sources miss an important component of contemporary mineral trade.¹³

The scale and location of the Lobito Corridor, which passes through regions affected by armed conflict and human rights abuses, highlight the risks underpinning Global Gateway investments. In such contexts, projects need more than technical and financial solutions; they also require systematic attention to political economy dynamics and governance structures. The central question is therefore not only what Global Gateway seeks to achieve but how its ambitions and safeguards can be operationalised in complex and fragile environments.

3. Fragile Contexts and Mineral Governance: The Case of the DRC

These dynamics are particularly evident in the DRC, which illustrates both the strategic importance of, and risks associated with, investments in critical mineral supply chains. The country holds some of the world's largest reserves of cobalt,¹⁴ alongside significant deposits of copper and other minerals essential to the global energy transition,¹⁵ thereby positioning it as a pivotal actor in emerging supply chains.

At the same time, the DRC's mineral wealth is deeply embedded in a system shaped by conflict, weak governance, and contested authority. Since the Second Congo War, particularly in the eastern provinces, patterns of armed conflict have persisted and remain closely linked to resource extraction. Systems of elite capture, limited state oversight, and informal or illicit mining networks have enabled armed groups and criminal actors to derive revenue from the mineral trade,¹⁶ while competition over land and resource access has fuelled local grievances, human rights violations, and intercommunal conflict.¹⁷ This is reflected in interviews with Congolese civil society actors, who highlight how armed groups continue to rely on control of mining areas for financing. They also note that past opaque contracts, which failed to benefit

¹¹ Karkare, P. and Byiers, B. (2025). *The Lobito Corridor: Between European geopolitics and African agency*. ECDPM. <https://ecdpm.org/application/files/6217/6235/7263/The-Lobito-Corridor-Between-European-geopolitics-African-agency-ECDPM-Discussion-Paper-386-2025.pdf>; Marques de Morais, R. (2025). *Debunking the Myths of the Lobito Corridor*. Maka Angola. <https://www.makaangola.org/2025/11/debunking-the-myths-of-the-lobito-corridor/>

¹² Gulley, A. L. (2023). *China, the Democratic Republic of the Congo, and artisanal cobalt mining from 2000 through 2020*. PNAS. <https://www.pnas.org/doi/epdf/10.1073/pnas.2212037120>

¹³ Interview with Fabien Mayani, Director of the Extractive Industries Governance Program, The Carter Center in the DRC, 16 April 2026.

¹⁴ U.S. Geological Survey (2024). *Mineral Commodity Summaries*. https://pubs.usgs.gov/periodicals/mcs2024/mcs2024-cobalt.pdf?utm_

¹⁵ U.S. Department of Commerce (2026). *Democratic Republic of the Congo – Mining and Minerals*. <https://www.trade.gov/country-commercial-guides/democratic-republic-congo-mining-and-minerals>

¹⁶ The Enough Project. *Progress and Challenges on Conflict Minerals*. <https://enoughproject.org/special-topics/progress-and-challenges-conflict-minerals-facts-dodd-frank-1502>; IPIS (2022). *Armed conflict, insecurity, and mining in eastern DRC*. https://ipisresearch.be/wp-content/uploads/2023/12/202010_IPIS_Armed-conflict-insecurity-and-mining-in-eastern-DRC_Accessible-PDF.pdf

¹⁷ Interview with Congolese civil society actor, 09 April 2026, on how mineral wealth can fuel patronage networks and local tensions.

local people affected by mining, have contributed to deep mistrust of both government and external investors among local communities.¹⁸

Despite periods of reform and sustained international engagement, governance challenges — including corruption, weak regulatory capacity, and lack of transparency and accountability — continue to constrain the development potential of the country’s resource wealth.

These conditions create a highly challenging environment for large-scale infrastructure and mining investments. Such projects operate within, and may reinforce, existing political and economic structures. Without robust safeguards, they risk exacerbating inequalities, enabling corruption, entrenching exclusion of local actors, and intensifying conflict dynamics through displacement, opaque revenue flows, or the marginalisation of local communities from decision-making and governance.

The DRC case therefore underscores a broader implication for Global Gateway: in fragile and conflict-affected settings, securing critical mineral supply chains cannot be separated from the governance contexts in which they are embedded. Even well-intentioned investments risk reproducing the structural drivers of instability they seek to address if these dynamics are not carefully considered in the design, implementation, and evaluation of multi-stakeholder partnerships. This requires partnerships that engage local actors such as young people, women, other community members, and small and medium-sized enterprises (SMEs), affected by major investment projects.

4. Infrastructure, Mining, and Conflict Dynamics

Large-scale infrastructure and extractive investments are not neutral; they are embedded in, and actively interact with, the political and social contexts in which they operate. A substantial body of research — including work by the World Bank and the OECD — shows that resource extraction in fragile settings is frequently associated with heightened risks of violence, particularly where governance is weak and institutions lack the capacity to manage revenues transparently.¹⁹

Infrastructure corridors and mining projects often redistribute access to land, resources, and economic opportunity, thereby altering local power relations and creating incentives for competition among state and non-state actors. In such contexts, logistics networks and transport corridors can become strategic assets within wider political and conflict dynamics.

Three interrelated pathways drive these risks wherever such projects are found:

- **Land acquisition and displacement:** Large-scale projects often require extensive land acquisition, frequently in areas where tenure systems are informal, overlapping, or contested. Without robust safeguards, this can result in dispossession, loss of livelihoods, and heightened tensions between communities, companies, and the state.²⁰

¹⁸ Interviews with Congolese civil society actors, 11 March 2026.

¹⁹ World Bank (2017). *The Role of Extractives in Fragile and Conflict-Affected States*; OECD (2016). *OECD Due Diligence Guidance for Responsible Supply Chains of Minerals from Conflict-Affected and High-Risk Areas*.

²⁰ UNEP (2009). *From Conflict to Peacebuilding: The Role of Natural Resources and the Environment*; World Bank (2017). *The Role of Extractives in Fragile and Conflict-Affected States*. Interview evidence further highlights that poorly managed displacement or land expropriation linked to large-scale infrastructure projects can become a major

- **Elite capture and unequal benefit distribution:** Revenues and economic opportunities linked to extractive industries frequently accrue to political and business elites,²¹ particularly where accountability and oversight mechanisms are weak.²² This can reinforce structural inequalities while limiting the developmental impact of resource wealth.
- **Conflict economies and armed actor involvement:** New infrastructure and extraction activities can generate opportunities for armed groups and illicit networks to engage in taxation, extortion, or direct participation in resource exploitation, thereby embedding such projects within existing conflict economies.²³

Across these pathways, exclusionary governance and inadequate community engagement function as risk multipliers. Projects designed without meaningful public participation, transparency, and accessible grievance mechanisms can deepen perceptions of marginalisation and injustice, particularly in regions with pre-existing social or political tensions. In such settings, disputes over land, resources, or benefits are more likely to escalate into open conflict.²⁴

The case of the Lobito Corridor illustrates these dynamics in practice. While offering significant economic potential, it does not merely operate within a given risk environment; it also shapes political and economic relations along its route. This underscores a broader point: infrastructure corridors in fragile settings are not simply exposed to conflict risks. They can also reconfigure them.

Therefore, infrastructure and extractive investments in fragile and conflict-affected contexts must be understood as inherently political processes. Mineral supply chains are embedded in political economies shaped by power, legitimacy, and resource access. Their stability depends not only on infrastructure efficiency, but also on whether underlying governance arrangements are perceived as legitimate and inclusive. “If local populations do not perceive tangible and fair benefits, mining investments can quickly become sources of mobilisation and conflict,”²⁵ observed Blaise Bubala, Team Leader of the Mining Working Group in South Kivu. Without deliberate efforts to ensure inclusivity, transparency, and accountability, such investments risk reinforcing — rather than mitigating — the structural drivers of instability they are often intended to address.

5. Gaps in Oversight, Coordination, and Transparency

source of conflict where consultation and compensation processes are not perceived as fair or transparent (Interviews with Congolese civil society actors, 11 March 2026).

²¹ OECD (2016). *OECD Due Diligence Guidance for Responsible Supply Chains of Minerals from Conflict-Affected and High-Risk Areas*; Natural Resource Governance Institute (2020). *Resource Governance Index 2020*.

²² Interview with Congolese policy expert, 09 April 2026, on how investments in fragile contexts can exacerbate instability if local interests are sidelined.

²³ Civil society perspectives from the DRC emphasise that armed groups benefiting from informal mining may actively resist or attempt to disrupt formal investment projects in order to protect their economic interests (Interviews with Congolese civil society actors, 11 March 2026).

²⁴ UN Guiding Principles on Business and Human Rights (2011). *Protect, Respect and Remedy: A Framework for Business and Human Rights*; OECD (2018). *Guidance for Responsible Business Conduct*.

²⁵ Interview with Congolese civil society expert, 08 April 2026.

Major challenges in governance, coordination, and transparency shape the Lobito Corridor's implementation. Despite its prominence as a flagship Global Gateway initiative, significant gaps remain in how the project is structured, financed, and overseen. These gaps are not merely issues of accountability; they actively raise conflict risk through three channels: information asymmetries, elite capture, and the marginalisation of affected communities.

The Lobito Corridor railway partnership was advanced on the margins of the 2023 G20 Summit in New Delhi and was formalised through a Memorandum of Understanding signed in Brussels in October 2023.²⁶ It brings together the EU, the US, and the governments of Angola, the DRC, and Zambia, alongside participating EU Member States.²⁷ The initiative also encompasses investments in agricultural value chains, logistics infrastructure, and regional trade facilitation along the corridor. These commitments reflect the EU's dual objective of promoting development while securing access to critical raw materials. As European Commissioner Jozef Síkela noted, the Corridor is intended to unlock both mineral supply chains and broader economic opportunities along its route.²⁸

Although Global Gateway is framed as a sustainable and transparent alternative to other global infrastructure models, including China's BRI, detailed information on its financial structure, implementation arrangements, and distributional impacts remains limited. Analysis by organisations such as Eurodad, Counter Balance and Oxfam²⁹ has highlighted the lack of publicly available data on the balance between public, concessional, and private financing within Global Gateway projects, including the Lobito Corridor. This opacity complicates efforts to assess financial risks, development outcomes, and the allocation of risk among public actors, private investors, and host governments, revealing an inherent tension between partner countries' development goals and financiers' strategic interests.

At the apex of Global Gateway's governance and financing structure sits the Global Gateway Board, chaired by the President of the European Commission and comprising the foreign ministers of all EU Member States. The Board is tasked with providing strategic guidance on the implementation of Global Gateway projects and coordinating both programmed EU budget investments and Member States' contributions.³⁰ Its membership also includes the Vice-President of the Commission/High Representative of the Union for Foreign Affairs, the Commissioner for International Partnerships (INTPA), the Commissioner for Neighbourhood and Enlargement, and other Commissioners responsible for thematic areas such as digitalisation, food systems, and health. Representatives of the European Parliament, as well

²⁶ European Commission (2023). *Global Gateway: EU signs strategic partnerships on critical raw materials value chains with DRC and Zambia and advances cooperation with US and other key partners to develop the 'Lobito Corridor'*.

https://ec.europa.eu/commission/presscorner/api/files/document/print/en/ip_23_5303/IP_23_5303_EN.pdf?utm_

²⁷ European Commission (2025). *Lobito Corridor - Building the future together*. https://international-partnerships.ec.europa.eu/lobito-corridor-building-future-together_en

²⁸ European Commission (2025). *Global Gateway: EU scales up the European engagement in the Lobito Corridor*. https://global-gateway-forum.ec.europa.eu/news/global-gateway-eu-scales-european-engagement-lobito-corridor-2025-10-10_en

²⁹ Eurodad, Counter Balance, and Oxfam (2024). *Who profits from the Global Gateway? The EU's new strategy for development cooperation*.

https://assets.nationbuilder.com/eurodad/pages/4589/attachments/original/1728405785/01_EU-GG-report-2024-FINAL.pdf?1728405785

³⁰ Bilal, S. and Teevan, C. (2025). *Global Gateway: Where now and where to next?* ECDPM.

<https://ecdpm.org/application/files/1617/1776/7785/Global-Gateway-Where-now-and-where-to-next-ECDPM-Discussion-Paper-2024.pdf>

as European financial institutions, attend as observers.³¹ The Board reviews all projects presented by Member States, including submissions from public development banks on their activities. However, the Board conducts its deliberations in private, without access for civil society.

At the local level, concerns about transparency and participation are even more pronounced. Research by Global Witness in the DRC mining hub of Kolwezi³² indicates that affected communities recognise potential economic benefits — particularly improved market access and small-scale trade — but remain uncertain about the project’s social and environmental implications.

Civil society actors have called for mandatory, meaningful consultation with affected communities and transparency in contract formation and implementation, with direct access to basic information on the mineral assets being negotiated, their value, quantities, location and the terms under discussion.³³ “Communities must be engaged from the project design phase, not after decisions are made,”³⁴ emphasises Philippe Ruvunangiza, Director of the Bureau of Scientific and Technical Studies (BEST DRC) in Bukavu. Similarly, Emmanuel Kayoni of African Natural Resources Watch (AFREWATCH) notes that communities and local Congolese NGOs seek a more active role in understanding the project’s impact on their environment and livelihoods. However, they continue to face constraints in accessing key documents, including the “road map” agreement with the Congolese government³⁵ and implementation plans, raising fundamental questions about the ability of local actors to monitor implementation and hold major stakeholders accountable for agreements that have already been reached but remain inaccessible.³⁶

These challenges are compounded by coordination constraints within the “Team Europe” approach, which brings together multiple institutions, EU Member States, and financial actors. While intended to enhance scale and coherence, this model can simultaneously diffuse responsibility and obscure accountability, particularly in complex, multi-country projects such as the Lobito Corridor. “There is nothing called Team Europe but a dialogue without legal grounding, so really it is a group of friends sitting together at the table,”³⁷ argues Paul Okumu of the Africa Platform.

Okumu further notes that civil society engagement at the country level remains limited because projects are often managed through separate national or financial institution channels rather than through EU delegations. Public development banks and other DFIs also maintain distinct consultation mechanisms with little coordination between them. As a result, information flows

³¹ Ibid

³² Global Witness (2025). *Thousands in DRC could face eviction from Lobito Corridor railway*. <https://globalwitness.org/en/campaigns/transition-minerals/thousands-in-drc-could-face-eviction-from-lobito-corridor-railway/>

³³ Interview with Fabien Mayani, 16 April 2026.

³⁴ Interview, 08 April 2026.

³⁵ ACGM (2024). *Press Release: The African Coalition on Green Minerals expresses its concern about the lack of transparency in the process of drawing up the roadmap on energy transition minerals between the DRC and the EU*. <https://afrewatch.org/wp-content/uploads/2025/01/ACGM-press-release-on-the-signing-of-the-roadmap.pdf>

³⁶ Interviews with Congolese civil society actors, 11 March 2026.

³⁷ Interview, 13 April 2026.

remain fragmented and civil society participation is often stronger on development issues than on the commercial dimensions of projects.³⁸

With only broad criteria for designation as a Global Gateway project, standards for involving civil society vary considerably. Development bank–client relationships are often cited as a constraint: companies frequently do not permit public disclosure of data until the final stages of a project.

The consequences of this lack of coordination, which can lead to the exclusion of civil society, extend beyond governance concerns; they may directly heighten conflict risks.

First, information asymmetries and weak local engagement may create opportunities for organised crime networks and armed actors to exploit infrastructure projects, particularly in regions where state authority is fragmented and local budget monitoring is absent. Evidence from Transparency International shows that where corruption intersects with political and security dynamics, it can contribute to identity-based violence and human rights abuses, as observed in contexts such as Afghanistan, Mali, and Sudan.³⁹

Second, the lack of transparency about financial and governance arrangements can facilitate corruption and illicit financial flows, including the diversion of resources and the proliferation of arms. The United Nations Institute for Disarmament Research (UNIDIR) and the United Nations Office on Drugs and Crime (UNODC) have highlighted how weak accountability in large-scale infrastructure and extractive investments can contribute to such dynamics,⁴⁰ particularly where oversight mechanisms are limited.

Finally, the exclusion of local stakeholders — including civil society, women, and youth — from information-sharing and decision-making processes undermines the sustainability of both development and peacebuilding outcomes. Regional and international peacebuilding standards and practices increasingly underscore the importance of inclusive governance, gender-sensitive approaches, and participatory mechanisms in mitigating post-conflict tensions.⁴¹ Where such inclusivity is lacking, infrastructure investments risk weakening — rather than reinforcing — social cohesion and long-term stability.

Taken together, these dynamics point to a central challenge for Global Gateway: without strengthened transparency, clearer accountability, and meaningful local participation, large-scale infrastructure investments risk falling short of their development objectives while exacerbating the governance and conflict dynamics they are intended to address. Beyond the harm this does to affected populations, it also puts investments and investors' reputations at

³⁸ Ibid.

³⁹ Transparency International (2025). *Sabotaging Peace – Corruption as a Threat to International Peace and Security*. <https://ti-defence.org/wp-content/uploads/2025/06/Corruption-as-a-threat-to-peace-and-security.pdf>

⁴⁰ UNIDIR & UNODC (2022). *Addressing the linkages between illicit arms, organized crime and armed conflict*. [https://www.unodc.org/documents/firearms-protocol/2022/UNIDIR-UNODC Addressing the linkages between illicit arms organized crime and armed conflict.pdf](https://www.unodc.org/documents/firearms-protocol/2022/UNIDIR-UNODC%20Addressing%20the%20linkages%20between%20illicit%20arms%20organized%20crime%20and%20armed%20conflict.pdf)

⁴¹ UNSC (2000). *UN Security Council Resolution 1325*. <https://www.securitycouncilreport.org/atf/cf/%7B65BFCF9B-6D27-4E9C-8CD3-CF6E4FF96FF9%7D/WPS%20SRES1325%20.pdf>; United Nations & World Bank (2018). *Pathways for Peace: Inclusive Approaches to Preventing Violent Conflict*. <https://openknowledge.worldbank.org/entities/publication/4c36fca6-c7e0-5927-b171-468b0b236b59>; OECD (2022). *States of Fragility 2022*. https://www.oecd.org/en/publications/2022/09/states-of-fragility-2022_9ee73e08.html

risk, while bringing negative consequences for global peace and the security of donor countries in the Global North in the longer term.

6. Reframing Mineral Security: From Supply Chains to Political Settlements

The analysis above points to a central insight: mineral supply security cannot be understood solely in logistical or economic terms. It is closely connected with the political and social contexts in which extraction and infrastructure investments take place.

In fragile and conflict-affected settings, supply chains are not simply technical systems linking production to markets; they are embedded in political economies shaped by power, legitimacy, and resource access. Their stability depends not only on infrastructure efficiency, but also on the extent to which underlying governance arrangements are perceived as legitimate and inclusive.

This reframing has important implications for Global Gateway. Efforts to secure CRMs are often driven by geopolitical imperatives — diversification, resilience, and strategic autonomy. Yet these objectives are deeply intertwined with local realities. Where governance is weak, benefits are unevenly distributed, or communities are excluded, infrastructure investments can generate resistance, disruption, and instability — ultimately undermining the very supply security they seek to ensure.

Mineral supply chains are not external to political settlements; they are part of them. Their durability depends on whether they align with, reinforce, or destabilise existing arrangements of power and resource distribution. Perspectives from civil society actors in contexts such as Kolwezi underscore that uncertainty around land, environmental impacts, and benefit-sharing is not a peripheral issue, but is central to whether projects are accepted, contested, or resisted. Community perceptions of exclusion, lack of transparency, and limited local benefit can, in turn, shape whether mining investments contribute to stability or become sources of mobilisation and conflict.⁴²

7. Conflict Sensitivity: From Norms and Principles to Practice

EU norms, regulations and policy positions related to CRMs include some core elements of conflict sensitivity such as due diligence, risk assessment, responsible sourcing, traceability and mitigation obligations.⁴³ Together, they are evidence of commitments by the EU to advance conflict-sensitive governance of CRMs, including some awareness of the need to mainstream a conflict sensitivity lens into CRM programming. In 2025, the European Commission's Directorate-General for International Partnerships (DG INTPA) published a conflict sensitivity

⁴² Interviews with Congolese civil society actors, 11 March 2026.

⁴³ The 2016 OECD Due Diligence Guidance, endorsed by the EU, for responsible supply chains of minerals from conflict-affected and high-risk areas; Regulation (EU) 2017/821 laying down supply chain due diligence obligations for Union importers of tin, tantalum and tungsten, their ores, and gold originating from conflict-affected and high-risk areas; Regulation (EU) 2023/1542 concerning batteries and waste batteries; and the 2024 Critical Raw Materials Act.

guidance note on CRMs,⁴⁴ offering direction to staff working in EU institutions on how to integrate conflict sensitivity into initiatives focused on CRMs.

However, as highlighted in previous analyses,⁴⁵ there remains a gap between commitments to accountability, human rights, indigenous rights, and public participation in the selection of Global Gateway projects, and the implementation and impact of CRM policy, particularly in relation to conflict dynamics and governance.⁴⁶ Conflict risk is not simply a feature of context; it can be exacerbated or reduced by how projects are financed, structured, and implemented, and by how risks and returns are distributed across actors. Blended finance models, risk guarantees, and public–private partnerships redistribute risks and returns across actors, influencing whose interests are prioritised and whose risks are transferred elsewhere. Bridging the gap between normative commitments and operational practice requires closer attention to the incentives that shape investment decisions.

Three interrelated dynamics are key to understanding the tension between *what should be done to be conflict sensitive* and *why it is often not done*:

- **Commercial and political demands vs. due diligence:** While CRM projects are fundamentally long-term, and it is quite normal for businesses and financial institutions to spend substantial time conducting feasibility studies, private firms and investors face pressure to deliver projects efficiently and profitably. Pressure may also come from the host government, which may have an incentive to dissuade companies from conducting conflict analysis, or doing substantial community engagement. These commercial and political pressures usually conflict with due diligence and the processes required for meaningful consultation, conflict analysis, and adaptive management.
- **Externalisation of risks:** Financial actors may shift political, social, and environmental risks onto host governments and local communities, particularly where accountability mechanisms are weak. This can exacerbate grievances while insulating investors from the consequences of instability. Moreover, there are sometimes issues around who is constructing versus who is managing/running the infrastructure which can shift the risks and incentives on to others.
- **Geopolitical pressures:** Geopolitical urgency emphasises speed and scale, while conflict-sensitive approaches require long-term engagement and flexibility. This tension is rarely resolved in project design, creating implementation gaps in which commitments are formally adopted but only weakly operationalised. In the Lobito Corridor, these dynamics are likely to shape the balance between rapid delivery and meaningful engagement with local communities.
- **Lack of rewards:** For investors, a significant disincentive is that they are not required or rewarded for being conflict sensitive. While they need to conduct environmental and

⁴⁴ European Commission (2025). *Conflict Sensitivity Guidance Note - Critical raw materials*.

<https://euagenda.eu/publications/conflict-sensitivity-guidance-note-critical-raw-materials>

⁴⁵ EU Raw Materials Coalition (2025). *Critical Raw Materials: Strategic Projects Selection Bypasses Civil Society*. <https://eurmc.org/news/critical-raw-materials-strategic-projects-selection-bypasses-civil-society/>

⁴⁶ ECDPM (2025). *Global Gateway investments in fragile settings: How to do it?* <https://ecdpm.org/work/global-gateway-investments-fragile-settings-how-do-it>

social impact assessments, for example, in order to access finance from development banks, conflict analysis is strictly optional.

Operationalising conflict sensitivity is therefore far more than a normative or technical challenge: it is a question of aligning incentives across public and private actors.

8. From Coordination to Co-Governance: Platforms, Actors, and Accountability

The EU's current approach to Global Gateway emphasises coordination under the "Team Europe" model. However, coordination alone is insufficient in a complex, multi-actor, high-risk environment. What is required is a shift towards co-governance: structured, institutionalised platforms through which diverse actors jointly shape, monitor, and adapt investments over time. Unlike coordination mechanisms, which align existing actors, co-governance entails shared decision-making authority and accountability across stakeholders.

In March 2026, the European Parliament debated and adopted the report "Global Gateway – past impacts and future orientation",⁴⁷ the first parliamentary review since the strategy was launched in 2021. CONCORD, the European Confederation of NGOs working on sustainable development and international cooperation, analysed the report and welcomed the Parliament's call to:

- Improve the governance structure of Global Gateway and strengthen consultation with, and participation of, the civil society advisory platform;
- Promote greater transparency and effective monitoring of Global Gateway projects and their impacts in partner countries through improved EU disclosure of project and funding details; and
- Apply the highest standards of transparency and accountability to all financial institutions involved in implementation, and to align their financing with equitable and locally beneficial development outcomes.

In response to the European Parliament, CONCORD called on the EU to open up the governance of the Global Gateway Board by adapting its composition to include civil society as a stakeholder.⁴⁸ The think tank ECDPM also suggests that opening Board membership would foster greater ownership among EU Member States and relevant stakeholders, while enabling genuine dialogue with local authorities and CSOs.⁴⁹

In the meantime, platforms already exist that could create co-governance by bridging political bodies across the EU, development finance institutions and export credit agencies, private sector actors, national and local governments, and civil society organisations and community representatives. CONCORD asked the EU to involve the Civil Society and Local Authorities Advisory Platform "more meaningfully and systematically in policy dialogues and

⁴⁷ European Parliament (2026). *REPORT on Global Gateway - past impacts and future orientation*. https://www.europarl.europa.eu/doceo/document/A-10-2026-0045_EN.html

⁴⁸ CONCORD (2026). *Unlocking the Potential of the EU's Global Gateway: Meaningful engagement with civil society*. <https://concordeurope.org/resource/closing-the-gaps-the-importance-of-civil-society-engagement-in-the-global-gateway-2/>

⁴⁹ ECDPM (2024). *Global Gateway: Where now and where to next?* <https://ecdpm.org/application/files/1617/1776/7785/Global-Gateway-Where-now-and-where-to-next-ECDPM-Discussion-Paper-2024.pdf>

coordination mechanisms” such as the Global Gateway Investment Hub, Global Gateway Forum, the Business Advisory Group, and other relevant fora. The civil society umbrella group also urged greater information sharing and the creation of “regular and standard moments for structured exchange between representatives of the different parts of the Global Gateway governance architecture”.⁵⁰

Rather than relying on ad hoc consultation, there should be a project-by-project multi-stakeholder platform in which all relevant stakeholders, including local civil society, are represented, contribute to monitoring the implementation of projects, and share their views “constructively and equitably”.⁵¹

Such a cross-institutional dialogue space would enable joint risk assessment and scenario planning, transparent financial and operational reporting, inclusive participation and grievance mechanisms, and adaptive management systems capable of responding to evolving conflict dynamics. CONCORD notes that, beyond coordination issues, stakeholders in the Global Gateway framework currently cannot follow up on requested actions or responses from those responsible, as no such accountability mechanism exists.⁵²

In practice, these specific project platforms can anchor corridor-level co-governance arrangements for multi-country flagship projects such as the Lobito Corridor, supported by EU institutions but involving host governments, development finance institutions, private sector investors, and civil society actors. However, this multistakeholder strategy entails trade-offs, including higher transaction costs, longer implementation timelines, and potential resistance from both state and private actors reluctant to share decision-making authority.

For private sector actors, their participation will likely depend on clear incentives, such as reduced political risk, improved access to financing, or enhanced reputational benefits linked to compliance with high governance standards.⁵³ Without such incentives, co-governance risks remaining largely aspirational rather than operational.

This approach moves beyond compliance-based models towards shared responsibility. Its effectiveness, however, depends on whether accountability mechanisms are robust enough to influence behaviour rather than merely signal commitment, and on whether they create opportunities to align incentives across actors.

The challenge, therefore, is not only to make investments more conflict-sensitive but to redesign governance arrangements so that conflict sensitivity is embedded in decision-making itself.

9. A Forward-Looking Research and Policy Agenda

⁵⁰ CONCORD (2026). *Unlocking the Potential of the EU's Global Gateway: Meaningful engagement with civil society*. <https://concordeurope.org/resource/closing-the-gaps-the-importance-of-civil-society-engagement-in-the-global-gateway-2/>

⁵¹ Rodríguez Prieto, S. (2024). *Global Gateway's Moment of Truth*. European Democracy Hub. <https://europeandemocracyhub.epd.eu/global-gateways-moment-of-truth/>

⁵² Concord, *Unlocking the Potential*, Ibid.

⁵³ Interview with representative of a company active in copper/cobalt value chains, 7 April 2026.

The analysis in this paper points to the need for a more systematic base of evidence on how geostrategic infrastructure investments interact with conflict dynamics in practice.

Four areas are particularly important for future research:

- Impact on conflict dynamics: Do Global Gateway investments, particularly in the field of CRMs, reduce or worsen local conflict risks, and under what circumstances? Although existing studies provide evidence of links between CRMs projects and local conflicts, as CRM projects expand, further research is needed to provide evidence of the conditions under which investments contribute to peace or increase tensions. This work should be rooted in local realities, reflect community perspectives and be carried out with strong involvement of local researchers and experts.
- Incentives and behaviour: How to incentivise Global Gateway investors to be conflict sensitive? At present, conflict sensitivity is not a high priority for investors because it is neither mandatory nor rewarded. Therefore, an important area of further research is to examine incentives across public and private actors that underscore the strategic imperatives — including reducing operational risk, strengthening social licence, and enhancing long-term stability — that help advance the uptake of conflict sensitivity.
- Comparative research: To what extent do Global Gateway projects differ from other infrastructure initiatives in terms of conflict sensitivity and governance practices? There is insufficient evidence that the EU's emphasis on transparency, sustainability, and governance produces materially better outcomes in practice for people affected by conflict and instability in countries such as the DRC than the approaches of other actors. More systematic and comparative research across major initiatives like Global Gateway and BRI is needed to assess whether and how their stated principles materialise into different outcomes on the ground.
- Operationalising PeaceTech:⁵⁴ What PeaceTech metrics and methodologies can be used to assess whether investments contribute to stability, inclusion, and resilience? There are opportunities provided by the application of digital technologies, but despite the increased use of AI and other digital technologies in peacebuilding, PeaceTech remains underused in peace research and conflict analysis in contexts such as the DRC.

Addressing these questions requires moving beyond high-level policy analysis towards comparative research on practical governance practices in similar projects, corridor-level political economy mapping, firm-level behavioural analysis, financial architecture assessment, and community-level fieldwork that captures lived experiences and perceptions.

Such an agenda would help bridge the gap between normative ambition and operational reality while generating actionable insights for policymakers, investors, and practitioners.

⁵⁴ PeaceTech is the application of technology — such as AI, data analytics, social media, and mobile tools — to predict, prevent, and mitigate violent conflict, as well as to build sustainable peace. It is a term coined by PeaceTech Lab (formerly with the U.S. Institute of Peace) on the use technology to end violent conflict.

10. Conclusion: Reconciling Geopolitics, Markets, and Peace

Global Gateway represents an ambitious attempt to align infrastructure investment with strategic, economic, and development objectives. The Lobito Corridor illustrates both the potential and the risks of this approach.

The central challenge is less the absence of standards than the difficulty of implementing them in politically complex and fragile environments where competing incentives, weak institutions, and geopolitical pressures shape outcomes. Infrastructure investments shape power relations, resource access, and conflict dynamics, and their outcomes depend on how these dynamics are understood and managed.

For policymakers, this implies that mineral supply security cannot be pursued in isolation from governance and conflict considerations. For businesses and financial actors, it underscores that conflict-sensitive approaches are not only normative obligations but also strategic imperatives.

Ultimately, the credibility of Global Gateway as a values-based alternative will depend not only on *what* it builds, but on *how* it builds. If investments continue to prioritise speed, scale, and strategic access over inclusion, transparency, and accountability, they are likely to reinforce the very political and economic dynamics that drive instability.

In this sense, mineral supply security is not simply a question of diversification or resilience, but of alignment between external and domestic actors' interests. Where such alignment is absent, supply chains may prove not only fragile but actively destabilising. For producing and importing countries, the long-term legitimacy of mineral contracts will not depend on geopolitical narratives, but on whether they produce tangible local benefits. These include employment, skills transfer, better links between mineral extraction and the broader economy and ultimately “a fair sharing of wealth”,⁵⁵ thereby bolstering global peace and stability.

⁵⁵ Interview with Fabien Mayani, 16 April 2026.

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