Adelaide University

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ROAD TO BELÉM

BRIEFING #1 - SEPTEMBER 2025

Jean Monnet Centre of Excellence in Trade & Environment

Institute for International Trade

Institute for Sustainability, Energy and Resources

STRATEGIC CONTEXT

Harry Wardana
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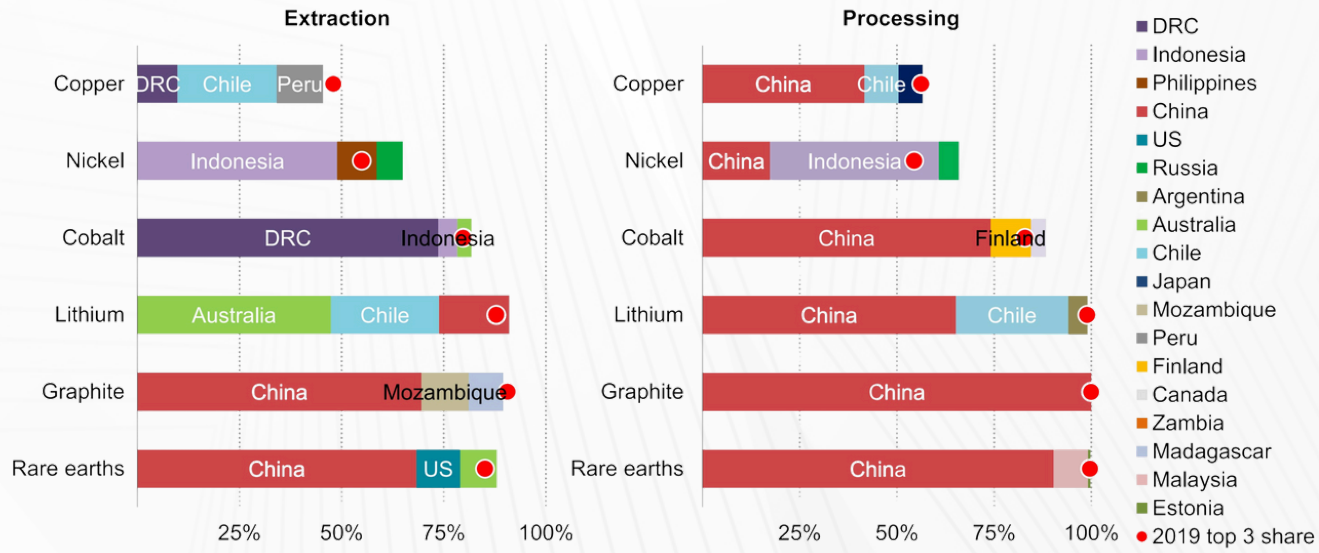
COP30 in Belém comes at a decisive moment for global climate action. With countries committing to tripling renewable energy capacity and accelerating electrification, the material foundations of the transition have moved to the centre of the debate. These minerals are indispensable for batteries, wind turbines, solar panels, and electric grids, making their availability and governance a strategic concern.

Yet, as the IEA data (see figure) demonstrates, supply remains highly concentrated, both in extraction and especially in processing. Just three countries account for more than two-thirds of global production for most key minerals, and in some cases (rare earths, graphite, cobalt refining) China's role exceeds 80-90%. Rather than diversifying in recent years, concentration has in fact intensified, deepening systemic risks. This exposes supply chains to disruption from export controls, market volatility, and political leverage, with direct implications for the credibility of global climate pledges.

COP30 BRASIL AMAZÔNIA BELÉM 2025

Mon, 10 Nov 2025 – Fri, 21 Nov 2025

Figure 1. Share of Extraction and Processing of Material Production by Country (2022)



Notes: DRC = Democratic Republic of the Congo. Graphite extraction is for natural flake graphite. Graphite processing is for spherical graphite for battery grade. Labels show only the top three countries per material.
Source: IEA. (2023). Critical Minerals Market Review 2023. IEA: Paris

KEY INSIGHTS

The mining sector faces four interconnected net-zero challenges:

1. To significantly increase metal output, especially for the green transition.
2. To do so from ores that are increasingly low-grade.
3. To achieve this expansion without causing any greenhouse gas emissions by 2050.
4. To adapt operations to reduce vulnerabilities to climate change impacts.

Source: Wooders, P. & Lobach, S. (2025). Critical Minerals – Trade, climate, and net zero pathways: Scenarios and implications for developing countries and climate-resilient development. Forum on Trade, Environment, & the SDGs (TESS) and Geneva Platform for Resilient Value Chains.

COP30 in Belém comes at a decisive moment for global climate action. With countries committing to tripling renewable energy capacity and accelerating electrification, the material foundations of the transition have moved to the centre of the debate. These minerals are indispensable for batteries, wind turbines, solar panels, and electric grids, making their availability and governance a strategic concern.

The figure also underscores a second dimension relevant to COP30 discussions: the imbalance between mining and processing. While countries like Australia, Chile, and the DRC dominate extraction, processing capacity is overwhelmingly concentrated in China. This structural dependency is not just a commercial risk, it raises fundamental questions about whether the world can achieve net-zero on a rules-based, cooperative footing. If processing bottlenecks remain unaddressed, the race to scale clean energy technologies could be slowed, or worse, distorted by geopolitical pressures.

For COP30, therefore, critical minerals are more than a supply-side story: they are an essential test of how climate diplomacy and trade architecture can evolve together. Discussions in Belém will need to grapple with three interlocking questions:

- How to diversify and secure supply chains against concentrated risks.
- How to ensure that the extraction and processing of minerals are aligned with sustainability and ESG standards.
- How to integrate critical minerals into a rules-based multilateral system that supports, rather than fragments, global net-zero pathways.

The Australia–EU dialogue on critical minerals provides an entry point to these broader debates. By aligning trade, sustainability, and industrial policy, both partners can help shape the narrative at COP30, demonstrating that climate ambition can be matched by credible pathways to resource security, and that supply chain resilience is not an afterthought but a foundation of the green transition.

Looking ahead, this framing also matters for Australia's diplomatic positioning. If Adelaide is confirmed as the host of COP31, Australia will be expected to show how its critical minerals sector can underpin not only its own energy transition but also trusted global partnerships. The conversations beginning in Belém can thus lay the groundwork for Adelaide to present a vision of resilient, transparent, and inclusive mineral supply chains as a cornerstone of global climate governance.

POLICY BRIEF

Australia-EU Critical Minerals Partnerships: Navigating Supply Security and Climate Commitments

Göran Roos
Adjunct Professor at the Institute for Sustainability, Energy and Resources (ISER)

Introduction

The global transition to net-zero emissions requires substantial increases in critical mineral supplies for clean energy technologies. The COP30 Action Agenda emphasises tripling renewable energy capacity and accelerating zero-emission technologies (Brazil (COP30 Presidency), 2025), creating unprecedented demand for lithium, cobalt, nickel, and rare earth elements. The International Energy Agency projects overall critical mineral demand for clean energy applications will quadruple by 2040, with lithium demand potentially increasing by over 40 times (Institute of Environmental Assessment and Water Research, 2025; Carrara et al., 2023).

Australia emerges as strategically positioned to meet this demand, serving as the world's largest lithium producer (49% global production) and ranking among top-five global producers of cobalt, nickel, and rare earth elements (Australian Government, Department of Industry, Science and Resources, 2023; Britt & Czarnota, 2024).

49%

Li 6.941 Lithium

Australia as the world's largest lithium producer

Co 58.933 Cobalt

Ranking among top-five global producers of cobalt

However, the European Union faces profound import dependencies, with China providing 100% of EU heavy rare earth elements supply and controlling approximately 90% of global rare earth refining capacity (Rockwell, 2025; Cohen et al., 2023).

The May 2024 Australia-EU Memorandum of Understanding on Critical Minerals establishes a framework for cooperation (European Union, & Government of Australia, 2024), yet implementation faces significant challenges from Chinese export controls, market manipulation, and complex social licensing requirements. This policy brief examines the partnership's design, external pressures, and pathways for effective implementation.

Partnership Framework and Commercial Structures

Bilateral Cooperation Mechanisms

The Australia-EU strategic partnership encompasses three primary areas involving sustainable raw material value chain integration, research cooperation on environmental impact mitigation, and environmental, social and governance standards alignment (Roche, 2024; European Union, & Government of Australia, 2024). Australia's Critical Minerals Strategy identifies 31 strategic minerals and establishes a A$30-42 billion project pipeline (Australian Government, Department of Industry, Science and Resources, 2023), supported by A$4 billion through the Critical Minerals Facility (Department of Jobs, Tourism, Science and Innovation, 2024).

Commercial partnerships operate through multiple models. Long-term offtake agreements provide revenue certainty through binding commitments where EU buyers commit to purchase specified volumes of future production at agreed price formulae (Zhou et al., 2025; Baršauskaitė et al., 2025). Hybrid offtake and equity arrangements align interests by providing upfront equity capital whilst signalling market confidence, as demonstrated by Stellantis securing offtake for nickel and cobalt whilst taking an 11.5% equity stake for €9.2 million (Stellantis N.V., 2023). Incorporated joint ventures between Australian and EU companies form legally distinct entities to jointly own and operate projects, sharing capital costs and operational risks (Johnson et al., 2025).

Financial Support Architecture

Financial mechanisms operate across the critical minerals value chain. Australia provides support through the Critical Minerals Facility offering loans and guarantees (Department of Jobs, Tourism, Science and Innovation, 2024), the National Reconstruction Fund's A$1 billion for value-adding (McDonagh, 2024), and future Production Tax Incentive benefits from 2027 to 2040 (Australian Government, Department of Industry, Science and Resources, 2023). The EU provides Strategic Project status under the Critical Raw Materials Act, offering streamlined permitting and facilitated finance access (European Parliament, & Council of the European Union, 2024), alongside European Investment Bank loans and Innovation Fund assistance.

The EU Critical Raw Materials Act establishes quantified benchmarks requiring 10% domestic extraction, 40% domestic processing, and 25% recycling by 2030, with no more than 65% sourcing from any single third country (Crochet & Zhou, 2024; European Parliament, & Council of the European Union, 2024). These targets generate systematic demand signals, with lithium requirements projected to increase 12-fold by 2030 (Crochet & Zhou, 2024).

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External Pressures and Market Dynamics

Chinese Export Controls and Strategic Competition

Chinese export controls create systematic challenges for Australia-EU partnership viability. China has implemented comprehensive dual-use export controls covering gallium, germanium, graphite, and antimony, operating through licensing requirements that gather intelligence on global supply chains (Baskaran & Schwartz, 2024; Nath & Bean, 2025). In December 2024, China imposed complete export bans on gallium, germanium, and antimony to the United States, followed by tightened export licenses for seven rare earth metals in April 2025, reportedly cutting export volumes by up to 80% (European Parliament, 2025; Perera, 2025).

Market concentration amplifies vulnerability to Chinese policies. China controls approximately 85-90% of global rare earth element mine-to-metal refining, 68% of cobalt refining, 65% of nickel processing, and 60% of lithium-ion battery grade processing (Cohen et al., 2023; Bedford et al., 2024; Nath & Bean, 2025). Europe imports 98% of its rare earth requirements from China, creating acute dependency (European Commission, Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs, 2023).

Price Manipulation and Investment Barriers

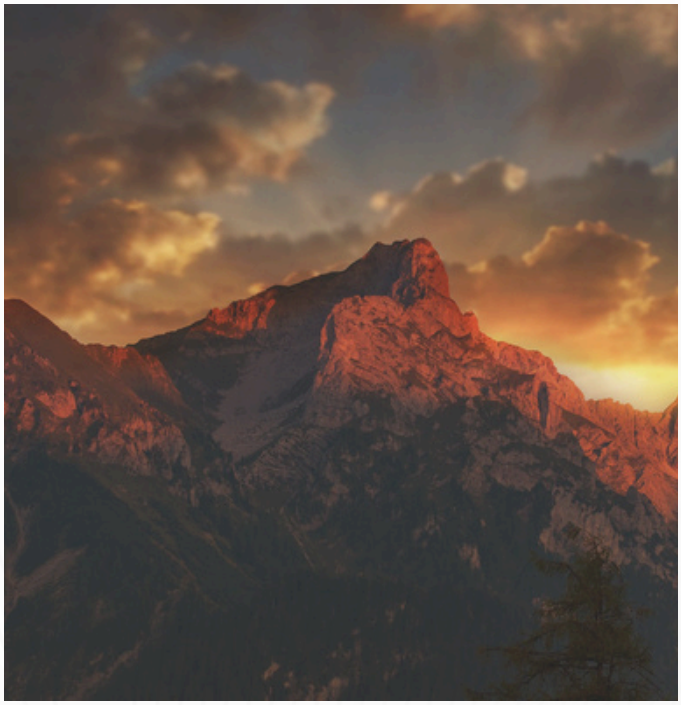
Chinese market manipulation operates through systematic oversupply and price depression to force Western operations closure. Cobalt prices fell 59.5% between May 2022-2025, forcing closure of America's only cobalt mine within one year of opening (Baskaran et al., 2024). Chinese investment patterns in Australian mining have shifted dramatically following enhanced regulatory scrutiny, with Chinese investment falling from A$2.5 billion in 2020 to pre-mining boom levels (Ferguson et al., 2024; Body, 2025).

Australia's Foreign Investment Review Board has tightened scrutiny of Chinese investments in critical minerals projects, blocking proposed takeovers on national interest grounds (Bedford et al., 2024). The US Inflation Reduction Act's incentives explicitly exclude materials involving "foreign entities of concern", creating pressure for Australian projects with Chinese ownership to restructure (Korolev & Wu, 2024; McDonagh, 2024).

Implementation Challenges

Social Licensing and Indigenous Rights

Social licensing emerges as fundamental to partnership viability. Research indicates 57.8% of Australian critical mineral projects lie within formally recognised Indigenous lands, rising to 79.2% when including native title claims (Burton et al., 2024; First Nations Clean Energy Network, 2024). Additionally, 54% of global energy transition mineral projects are located on or near Indigenous peoples' lands (OECD, 2025b; Owen et al., 2023).



Australia's approach emphasises free, prior, and informed consent processes aligned with the United Nations Declaration on the Rights of Indigenous Peoples (Sparks, 2023; Coyne & Satchwell, 2024). However, over 60% of Australian resources projects operate on Native Title land, requiring sophisticated consent frameworks that Australia has yet to fully translate into comprehensive legislation (Australian Government, Department of Industry, Science and Resources, 2023).

Environmental Standards and Carbon Considerations

EU taxonomy integration presents both opportunities and challenges. The EU Taxonomy Regulation establishes six environmental objectives but currently lacks specific technical screening criteria for mining due to complexity (Watson Farley & Williams LLP, n.d.). The EU Carbon Border Adjustment Mechanism, entering full implementation in 2026, will require importers to purchase certificates (European Commission. Directorate-General for Taxation and Customs Union, 2024), initially capturing 0.9% of Australian exports but creating important precedent effects (Cowie et al., 2023).

Critical minerals require substantially more energy to produce per unit than other commodities, but electrification and renewable-based electricity can reduce emissions intensity by over 80% for copper projects (IEA, 2021). Australia's Critical Minerals Strategy explicitly links sector development to net zero commitments (Sparks, 2023).

Policy Implications and Market Access

Competitiveness and Trade Diversion

The divergence in sustainability policies creates direct consequences for trade. When the Carbon Border Adjustment Mechanism's financial charges begin, Australian exporters without domestic carbon pricing will effectively pay tariffs to enter the EU, whereas competitors from countries with carbon pricing could avoid costs. This dynamic could divert trade flows toward more sustainability-compliant sources.

The EU Deforestation Regulation, delayed to 2027, bans imports of commodities like palm oil, rubber, wood, and coffee linked with recent deforestation. Complying requires exporters to implement strict traceability and supply chain verification (European Parliament, & Council of the European Union, 2024). ASEAN officials have criticised the regulation as imposing de facto trade barriers (European Parliament, & Council of the European Union, 2024).

Opportunities for Strategic Positioning

Australia-EU projects incorporating high environmental, social, and governance standards can position as premium suppliers in global markets. Vietnam's aggressive push into solar and wind energy has made it a leading exporter of solar equipment and attracted foreign clean-tech investment. Singapore's early establishment of carbon trading exchange and green bond standards is creating a sustainable finance hub.

Countries without credible sustainability plans risk being bypassed for international climate finance and technology transfer. Nations seen as climate laggards could face boycotts or divestment by ethically minded investors.

Policy Recommendations

Harmonised Framework Development

Australia and the EU should integrate critical minerals cooperation into future trade agreement negotiations, creating enforceable obligations on investment protection, export facilitation, and environmental, social and governance compliance (Akhtar & Schwarzenberg, 2024). The partnership requires systematic government intervention supporting private sector cooperation through blended financing, regulatory coordination, and strategic planning mechanisms.

Both parties should establish joint Strategic Reserve mechanisms involving coordinated stockpiling or funds offering voluntary offtake agreements (Department of Jobs, Tourism, Science and Innovation, 2024), acting as market stabilisers absorbing surplus during downturns and releasing supply during shortages. Government co-investment through Australia's Critical Minerals Facility and European Investment Bank can lower cost of capital and signal long-term commitment (McDonagh, 2024).

Enhanced Cooperation Mechanisms

The partnership should develop bilateral transparency platforms where all Australia-EU critical mineral projects report environmental, social and governance performance publicly, overseen by committees with representatives from both sides and civil society observers. Legal frameworks must encompass agreements on recycling and waste shipment ensuring materials are handled according to both EU and Australian regulations (Botwright & Feingold, 2024).

Joint research and development initiatives should target midstream challenges including efficient mineral refining, recycling technologies, and substitution of scarce materials. Collaboration should focus on developing technologies for urban mining involving recovery of minerals from end-of-life products and reprocessing mine waste and tailings (Department of Jobs, Tourism, Science and Innovation, 2024; Ellen MacArthur Foundation, 2025).

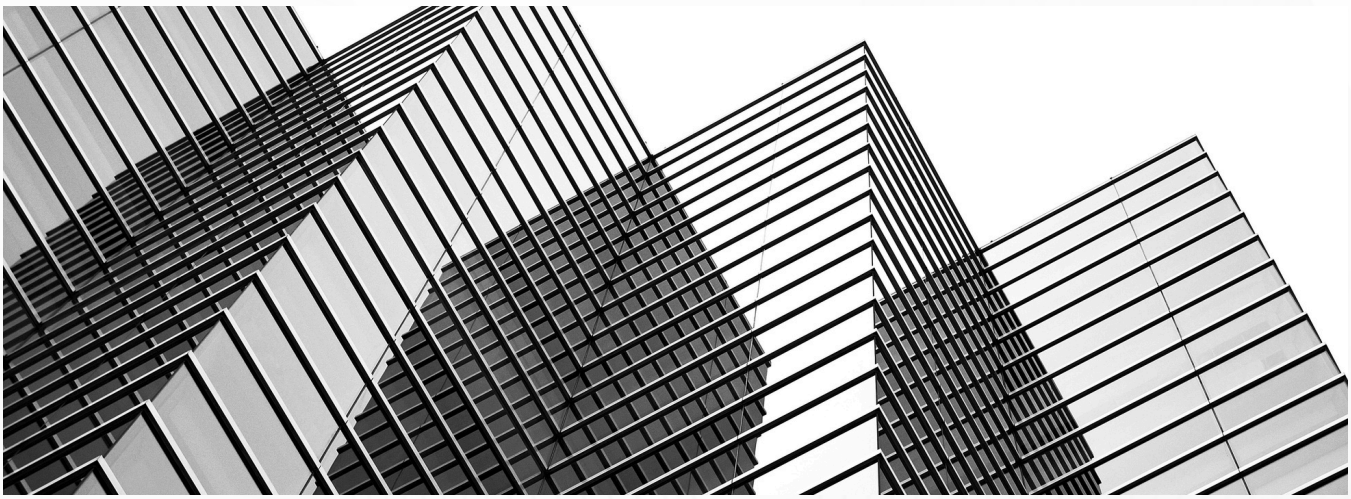
Risk Mitigation and Standards Alignment

Australia should implement model licensing regimes for critical minerals mandating comprehensive climate and community risk assessments, requiring companies to submit climate mitigation plans, community development agreements, and mine closure bonds before licences are granted. The EU should ensure broader trade and sustainability regulations recognise high-standard producers like Australia, preventing unintended trade barriers (European Parliament, & Council of the European Union, 2024a, 2024b).

Both partners should pioneer digital technologies including blockchain-based platforms creating fully traceable supply chains, allowing EU end-users to verify provenance and environmental, social and governance credentials from mine to market (Mudd et al., 2018). Supply chain transparency demonstrates that collaboration enables rather than exploits the global energy transition.

Conclusion

The Australia-EU critical minerals partnership represents strategic fusion of climate ambition with resource security challenges. Success requires sophisticated integration addressing social licensing frameworks, geoeconomic pressures from Chinese export controls, and environmental standards alignment. The partnership must incorporate mechanisms buffering projects from volatility whilst ensuring long-term investment horizons through structured agreements and government co-investment.



Implementation depends on translating framework agreements into concrete actions addressing technical complexity, capital intensity, and geopolitical competition characterising critical minerals markets. The evidence suggests bilateral cooperation aligned with climate action agendas can succeed through comprehensive integration of environmental standards, Indigenous rights protection, and innovative financing mechanisms designed to counter concentrated market power whilst demonstrating responsible development practices (Zhou & Crochet, 2023).

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Road to Belém
Seminar Series

#COP30
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Critical Minerals:
Australia-EU Collaboration for the Green Transition

1 October, 2025 (11am-12.30pm)
Napier Building, G04, Adelaide University

Göran Roos
Adjunct Prof, Institute for Sustainability, Energy and Resources

Nathan Gray
Senior Fellow, Institute for International Trade

Alexandra Wawryk
Senior Lecturer, Adelaide Law School

(moderator)
Peter Draper
Executive Director, Institute for International Trade

(MC)
Graham Nathan
Director, Institute for Sustainability, Energy and Resources

Living La Vida BoCA:
Border Carbon Adjustments and Rules-Based Trade

20 October, 2025 (10:30am-12.00pm)
Online Webinar

Tennant Reed
Director of Climate Change and Energy, Australian Industry Group

Peter Draper
Executive Director, Institute for International Trade

Susan Stone
Credit Union SA Chair of Economics, University of South Australia.

(moderator)
Harry Wardana
Research Fellow, Institute for International Trade

Powering the Shift:
Australia & Southeast Asia's Energy Trade

29 October, 2025 (11am-12.30pm)
Online Webinar

Putra Adhiguna
Managing Director, Energy Shift Institute

Peter Draper
Executive Director, Institute for International Trade

Ingrid Burfurd
Carbon Pricing and Policy Lead, The Superpower Institute

(moderator)
Harry Wardana
Research Fellow, Institute for International Trade

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