

East, Southern and Central Africa Observatory

Summary

The Great Lakes in the Race for Critical Raw Materials: What Role for the European Union?

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Executive summary

Defence industries, the digital economy and the energy transition all depend heavily on access to critical raw materials (CRM) such as cobalt, coltan, lithium, tungsten and rare earth elements. Competition for these resources is reshaping international relations and increasing the strategic importance of regions endowed with significant mineral wealth. **This note examines the strategies deployed by major powers (the United States, China, the EU, Gulf countries, etc.)** to secure access to CRMs from the Great Lakes (Democratic Republic of the Congo (DRC), Uganda, Rwanda and Burundi), while analysing how the states of the region are capitalising on renewed international interest in their subsoil resources.

Taken as a whole, the region possesses **considerable potential** in beryllium, cobalt, copper, gallium, germanium, graphite, lithium, nickel, niobium, rare earths, tantalum (coltan), tin (cassiterite), tungsten, uranium and zinc. Great Lakes states are seeking to leverage this mineral wealth as a driver of economic development and industrialisation while redefining the terms of cooperation with their external partners.

Due to particularly weak governance and severe infrastructure deficits, **Burundi** offers fewer opportunities to external actors than its neighbours. The other three countries, to varying degrees, attract strong interest from international investors. As the world's leading producer of coltan and cobalt, while also possessing vast copper and lithium reserves, the **DRC** constitutes a mining giant where international competition is already highly visible. Despite more modest reserves, **Rwanda** has established itself as a regional hub for the trade and processing of CRMs (coltan, tin and tungsten – ie. 3Ts), including through the export of resources originating from neighbouring countries. A more recent entrant to the sector, **Uganda** possesses significant yet still largely untapped potential, particularly in rare earths and graphite.

In the competition among powers, **China enjoys a clear advantage** thanks to its long-standing engagement and effective transactional approach (resources vs. infrastructure). Dominant in the Congolo-Zambian *Copperbelt*, the region's principal mining basin, it is also the leading destination for resources produced in the Great Lakes region, including those extracted by Western companies. This position reflects China's control over the most profitable segments of mineral value chains, from refining to the manufacture of industrial components.

Seeking to reduce its dependence on China, the United States has deployed significant resources to reposition themselves, combining financial and diplomatic tools in support of private actors, primarily in the DRC and, to a lesser extent, Rwanda. In exchange for alignment with Kinshasa's position in its rivalry with Rwanda, the Congolese government has already awarded several contracts in the copper, cobalt and lithium sectors to American firms. The impact of this renewed engagement nevertheless remains uncertain given the long lead times associated with mining projects and the profile of the companies involved, many of which lack relevant experience (and maintain close ties to the Trump administration). Other international actors include the United Arab Emirates, as well as companies from Western countries such as

Canada, Australia and the United Kingdom, whose mining sectors have proven more resilient than those of EU member states.

The EU, by comparison, finds itself in a more fragile position. Its support for regional states in areas such as infrastructure development, mining governance and geological mapping has yet to generate tangible gains in terms of secured supplies. **The EU struggles to assert itself as a “strategic power”** guided by clear long-term objectives. These difficulties stem from structural factors, including the relative weakness of its financial instruments and the decline of much of its mining industry, over which it exercises only limited influence. **These challenges are compounded by more contextual factors linked to the situation in the Great Lakes.** The region combines political and security instability, particularly in eastern DRC, weak governance (corruption and patronage), regulatory uncertainty driven by growing demands from local governments for increased revenue sharing, and significant infrastructure deficiencies (water, energy, roads, etc.). Rwanda, for its part, presents specific challenges arising from the authorities' reluctance to implement credible **traceability** mechanisms while its supply chains remain "contaminated" by Congolese minerals. These constraints affect all international investors, but weigh especially heavily on European actors, which are subject to stricter standards and more sensitive to security and reputational risks.

Despite intense competition, the Great Lakes region remains, owing to its potential, **an area of opportunity for the EU.** Certain value chains may offer promising prospects for European companies, particularly in emerging sectors such as manganese in the DRC and rare earths and graphite in Uganda. However, if the EU intends to strengthen its position, it will need to match the level of commitment demonstrated by its principal competitors.