

International symposium

# CHALLENGES OF RAW MATERIALS TRADE

Europe - Latin America - the Caribbean



Agence française de développement  
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May 25<sup>th</sup>  
and 26<sup>th</sup> 2023

## Executive report of the symposium

### « Challenges of raw material trade »

**May 25th and 26th 2023**

In the framework of the Latin America and Caribbean Weeks, the twelfth edition of the Institut des Amériques' symposium entitled "Challenges of raw material trade ", organised in collaboration with the EU-LAC Foundation, the Agence française de développement and the Ministère de l'Europe et des Affaires étrangères, was held on the May 25th and 26th 2023, at the Agence française de développement. The scientific coordination was carried out by Yvonne Bouvet (professor at Université Bretagne Occidentale) and Audrey Sérandour (PhD in Geography, Université Paris 1 Panthéon Sorbonne and post-doctoral student at Université de Haute-Alsace).

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General coordination of the executive report, including the summary of presentations and the analysis of participation, by Virginie Aron and Luis Miguel Camargo with support from Eloisa Ocando Thomas of the Institut des Amériques.

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## SUMMARY OF THE PRESENTATIONS

May 25th

Inaugural session

Françoise MOULIN CIVIL, president, Institut des Amériques

The presidency of the Institut des Amériques is delighted with the success of this symposium and the partnership with the AFD and the EU LAC Foundation as part of the 10th Latin America and Caribbean Weeks in France, a promising edition in terms of the number of events planned this year.

She emphasizes that this symposium follows the footsteps of the previous editions since 2012, focusing on the themes of contemporary challenges facing Latin America and Europe. She also reminds us that crossed views on Europe and Latin America are at the center of the discussions at the Institut des Amériques, and that this symposium is an opportunity for dialogue between the academic, industrial and diplomatic worlds.

She concludes by saying that there are many topics related to the trade in raw materials, and hopes that the symposium will provide some answers.

Philippe ORLIANGE, Director Géographies, Agence française de développement

Mr. Orliange begins his speech by recalling the historic links between AFD Group and Latin America through Pierre Denis, founder of AFD Group and a geographer and photographer specialized in Brazil. AFD Group began working in Latin America in the 2000s and is now one of the region's leading bilateral agencies. He is delighted that the annual colloquium has become a key event of the Latin America and the Caribbean Weeks.

He then reminds us of the stakes involved in the trade in raw materials: the ongoing energy transition also involves a growing need for minerals and depends on mining, causing a strong economic and social impact in the territories concerned: use of water resources, conflict over land use, questions of governance and the rights of local communities... He points out that 87% of lithium mines are located in indigenous territory.

This is why he insists that the energy transition cannot be achieved without Latin America, which is a key player in the challenge, and that Europe must respond to this challenge. The Escazú Agreement enables Latin America to position itself as a supplier of the minerals it possesses, but there are persisting negative externalities and the alternatives are limited; mining is an economic opportunity and a model for growth in Latin America and the Caribbean, but the energy transition must also call for changes in the European Union's commitment to a green transition.

Mr. Orliange points out that the climate has been at the heart of AFD Group's concerns for over ten years, and that it continues to fit into these lines in the wake of the Paris Agreement. The group no longer finances mining infrastructures, but wonders how existing structures can be maintained.

Finally, he gives a few examples of AFD Group's involvement in Latin America and the Caribbean, a region that receives around 1 million euros each year. He believes that AFD Group must continue to work towards reducing negative externalities, and hopes that the symposium will stimulate fruitful reflections in this direction, leading in particular to the drawing up of a list of essential metals, or to a revision of the taxonomy of green financing.

#### [Adrián BONILLA, Executive Director, EU-LAC Foundation](#)

Mr. Bonilla points out that the EU-LAC Foundation is an international organization formed by the governments of the CELAC countries and the European Union to promote bi-regional relationships. He announces that a summit of the foundation's heads of state will take place in July 2023, the first since 2015. One of its central themes, decided by foreign ministers meeting in Buenos Aires to prepare for the summit, concerns " just transitions ", in UN terminology.

He proceeds to highlight three dynamics that are taking place today: environmental, digital and social, making this colloquium highly relevant, as producing information on raw materials trade alludes to these three transitions.

Latin America is the region of the world that most needs this transition. The context of climate change implies assuming differentiated responsibilities according to the roles of the regions in affecting the environment. Latin America has played the same role since the 19th century

in the international division of labor, a process that in the last stage has been visualized as the so-called "defective globalization", an idea that identifies the structural vulnerabilities of the insertion of its economies in the world market. The economy of raw material production led to the reprimarization of productive processes in Latin America and the Caribbean, a consequence of the impact of global demand for primary goods, especially from the Chinese economy, which stagnated industrialization. Mr. Bonilla believes that the international terms of trade and the practice of exporting raw materials without adding value must be modified because it leads to an increase in global inequalities.

In the context of increasing demand for raw materials, immediate needs are confronted with the consequences of a long recession since the 2008 crisis, aggravated by the pandemic and consolidated by the war in Ukraine.

Under these conditions, how to build bi-regional cooperation logics, moderating asymmetries and the capacities and different vocations of the economies? How to reconcile the growing diversity of raw materials with the imperatives imposed by needs? These are questions whose political answers would define the nature of the relationship between Europe, Latin America and the Caribbean.

[Philippe BASTELICA, Secretary General of the Latin America and Caribbean Weeks, French Ministry of Europe and Foreign Affairs](#)

Mr. Bastelica is delighted to be here for this symposium, which addresses the challenges of trade in raw materials between Latin America and the Caribbean, and Europe. These two regions are called upon to meet a number of challenges, including that of establishing a geostrategic balance. Both sides of the Atlantic should be thinking about these issues, which is why this symposium is particularly important.

The speaker was pleased that this annual event had become one of the highlights of the Latin America Weeks since 2015, and recalled that it is aimed at two particular goals: raising awareness of Latin America and highlighting relationships between France and this region in order to move towards a safer, more prosperous and more united world. He recalls that this

is the tenth edition of the Latin America Weeks, and that this year it includes over 460 events in sixty-three cities in France and nine cities in seven Latin American states.

He was very happy to see a large audience at the opening of the symposium, among whom he recognized several traditional partners, a sign of the vitality and importance of the Latin America Weeks. He concludes by saying that this event is the fruit of a strategic partnership between the EU-LAC Foundation and the Institut des Amériques, and emphasizes that France wishes to see this strategic partnership deepened and perpetuated.

[Yvanne BOUVET and Audrey SÉRANDOUR, scientific coordinators](#)

The scientific coordinators of the symposium explain that each year, the Institut des Amériques and its partners choose a key theme to reflect on during a joint event. This year, the theme related to recent affairs (the war in Ukraine), the underlying dynamics of the French policy of mining renewal, and the geopolitical history of relations between Europe and Latin America built around the flow of raw materials.

The choice fell on non-renewable raw materials with a socio-environmental transition at stake, in a context of market competition heightened by political instability and war. Extraction in Latin America is seen as an asset that enables economic, social, political and energy transition. In this context, academic and private players have begun to reflect on how the existing balances are changing, in global events like the OECD forum or the Material Summit in Brussels, all of which reinforces the position of this symposium.

Three themes come into play during this event: environmental (reconciling needs with the desire for preservation), social (guaranteeing a fair transition across all sectors) and geopolitical (rethinking value chains and strengthening bi-regional relations).

The coordinators would like to thank the Institut des Amériques, the Agence Française de Développement, the EU-LAC Foundation and the French Ministry of Europe and Foreign Affairs for their organization, as well as all the speakers and moderators for their participation.

[Inaugural conference](#)



Sébastien TREYER, Managing Director, Institut du Développement Durable et des Relations Internationales (IDDRI)

Mr. Treyer begins by explaining how the posture of the IDDRI think tank, which he heads, is an interesting vantage point to approach the issues proposed by the symposium. IDDRI is a think tank set up by research organizations, institutions and businesses to consider international climate issues and find ambitious arrangements for international cooperation to address them. He emphasizes that the agreements take a bottom-up approach, based on national needs and trajectories, in order to reflect the specificity of each context.

He goes on to stress that Europe has a particular historical and political responsibility in terms of energy transition, and that IDDRI is committed to understanding why Europe and other countries are struggling to embark on their energy transition. At the same time, IDDRI shares the European Union's values of overcoming national interests and experimenting with multilateralism on a continental scale. These efforts converge with certain regional dynamics in Latin America. The think tank advises Europe on geostrategy and on how to build balanced partnerships with other regions, enabling them in turn to achieve the conditions for sustainable transition. Trade in raw materials represents an opportunity to secure energy resources for Europe, but also for other regions to embark on a just transition, which could prove strategic for Europe too.

He then outlines the partnerships between the two continents and how Latin America is questioning Europe about how the green deal could be a protectionist policy, so as not to fall into the race for state aid between China, the United States and Europe, leaving aside other regions of the world.

The work of the Deep Decolonization Pathways network is addressing these issues at national level. This is a network of economists around the world who establish a dialogue with governments in their own countries to build a constructive and sustainable public policy that does not come from external expertise. IDDRI has also been invited by the ECLAC to support the coordination of Latin American think tanks in 2021 and 2022, ahead of major international conferences on the environment. He thus speaks from a position at the interface between the perception of political and research issues.

He proceeds to cite the specific features of the European and Latin American regions to highlight what can bring them closer together: Latin America today is the bridge between South and North, as exemplified by the role Colombia and Guatemala took at the Rio+20 conference in 2012, or at COP15 on biological diversity. They are important intermediaries who play a key role in these issues. The Escazú Agreement highlighted the convergence of values despite political differences: the notion of environmental democracy brings Latin America and Europe closer together, as does the social market economy, for example.

Latin America clearly formulates the issue of extractivism, which creates social inequalities and environmental degradation, in several official documents, and he reminds us that this has been a fundamental issue since colonial times, and that the region has more than ten years of experience and failures in attempts to escape this extractivist logic.

Mr. Treyer explains that the question initiated by the role of raw materials invites us to look at other things: the framework is essential, but it invites us to go beyond simple commercial issues.

In Europe, many economic players have begun to invest in decarbonization, which has involved tough internal negotiations (the Border Carbon Adjustment Mechanism, legislation to reduce imported deforestation, development of state aid). Europe has developed measures internally, but has not sufficiently developed dialogue with major trading partners outside its territory.

This is accompanied by a strong desire for reindustrialization and friendshoring to ensure security of supply, which may seem incompatible with supporting sustainable development in Latin America. Yet the question of industrialization, or deprimarization, is a major and recurring issue in Latin America too, manifesting in highly protectionist or very open political contexts, as well as a strong tendency towards extraversion and export.

With this in mind, IDDRI believes that the free-trade agreement between Europe and Mercosur should be maintained, but that several aspects should be renegotiated, as it provides leverage in negotiations with governments. The reconfiguration of global value chains is also linked to digital and robotic issues, the transformation of labor productivity and post-Covid resilience. On the other hand, the pitfall to be avoided is to send producing countries back into a neo-colonial position of economic primarization: he here cites IDDRI's

work in South Africa, where the organization built a narrative with the University of Cape Town to encourage investment in green steel.

This is why IDDRI favors public arrangements and cooperation that capitalize on the idea that economic players on both sides have the capacity to innovate, and that jobs can be distributed in both regions to avoid the frontal positioning between provider and consumer.

Mr. Treyer concludes by stressing that these measures are decided less in trade treaties than by measures on investment rules: Europe must invest abroad, but with due regard for local socio-economic benefits too.

### Round Table 1 - Reconciling the need for raw materials with the desire to preserve the environment

**Moderator: Mathilde ALLAIN, lecturer in political science at IHEAL and researcher at CREDA**

The moderator points out that there is an apparent consensus on the need for decarbonization, but there are nuances on the modalities, the degree of adaptation and change, and the role of citizens in decision-making.

Changing the energy model means rethinking supply: can we extract energy from Europe's subsoil? She recalls that there are debates taking place in Germany and France about coal mining, while in Spain it is seen as an employment opportunity.

Ms Allain points out that in Latin America, extractivism is at the heart of development models and has encouraged growth in states of all political orientations. However, it is also accompanied by a rise in socio-environmental conflicts, which are linked to economic, political, democratic, professional and identity-related issues: local communities see it as a threat to their population, their way of life, and even their very lives (she points out that Latin America is one of the most dangerous regions for environmental activism).

She stresses that citizens are involved at all levels: as the first to be affected in local communities, sometimes marginalized, but also as relays in cities. We are reaching the limit of a primary export model dependent on raw material prices and foreign investment, which

confines the jobs created to a low-skilled workforce and accentuates the imbalances between North and South.

Finally, she concludes by saying that the notion of ecological transition takes on different meanings for each player, and that decarbonization does not always mean environmental protection or a fairer economy. She recalls the existence of "sacrificial zones", which seem destined to recur in a context where exports help to maintain fragile economies and stabilize their currencies.

[Maristella SVAMPA, researcher in sociology at Conicet-Argentina, member of the Eco Social and Intercultural Pact of the South](#)

Ms. Svampa suggests adopting a more holistic, integral vision of this transition, which must be able to articulate social and environmental justice in order to profoundly modify society's metabolic profile.

She emphasizes that this transition involves energy, which should go from being a private, centralized commodity to a common, decentralized and sustainable good. Yet the prevailing view is to reduce the notion of eco-social transition to that of a simple energy transition, and then to reduce the latter to a simple substitution of sources (from fossil energies to energies that are not completely renewable). In this way, the consensus on decarbonization is made primarily on behalf of the countries of the North and on their terms.

She then cites the example of lithium as a neo-colonial corporate transition that is not sustainable, as Argentina and Chile export lithium carbonate without controlling the value system, and which has a very strong water impact in countries that are already experiencing a water crisis. The second example revolves around conflicts linked to the mining industry: she points out that there are currently more than 295 mining-related conflicts on the continent, as this is a highly polluting activity and a vertical model of territorial occupation that imposes itself on local populations without consulting them. She concludes by saying that the countries of the North need to think about degrowth and the question of ecological debt.

Pia MARCHEGANI, Director of environmental policy at the Environment and Natural Resources Foundation (FARN); associate researcher in the global studies program at Flacso-Argentina.

The speaker begins by explaining that she is speaking at this meeting wearing two different hats: that of a researcher and that of a defender of the rights of the communities of Salinas Grandes, threatened by the exploitation of lithium for the last twelve years. She stresses that a new chapter is opening in the geopolitical battle for the control of critical minerals linked to the energy transition, new logics are forming (longshoring, friendshoring) and new narratives are appearing, such as the green pact, or green mining.

Argentina is the only country in the area known as "lithium triangle" (the speaker explains that she prefers to avoid this characterization) where lithium is freely concessionable and receives enormous pressure for its exploitation. However, the country's external debt is very high and it needs external investors on a very short term. Concrete environmental impacts can already be seen at the exploitation sites, which raises the question of environmental policies and community participation in extraction projects: she cites the example of Cauchari, where lithium has been extracted since 2014 following a negotiation with the communities by delegation of the State.

She then comes to the case of Salinas Grandes, where the communities have been asking for a right to prior consultation for twelve years, and now they refuse any dialogue. She asks what is the role of the States and financial institutions, when the counterpoint is Bolivia, where the State finances development strategies and the communities are partners in these projects.

She concludes by saying that the issue of environmental justice is very complex, with an important focus on electromobility, although it is not a completely sustainable solution and new forms of transport would have to be invented. She stresses that too much responsibility is left in the hands of the private sector when the scrutiny of human rights should be left to the States.

Solène REY-COQUAIS, PhD in geography from Université Paris 1 Panthéon- Sorbonne, associate researcher at UMR Prodig and lecturer at Ecole normale supérieure (Paris)

The speaker explains that she will be focusing on the issues surrounding copper mining in the Andean region, particularly in Chile and Peru. She explains that these two countries are the world's biggest exporters of copper concentrate, and that copper consumption has risen by 250% since the 1950s due to the massive electrification of societies. She gives the example of Moquegua (Peru), where 53% of the territory is dedicated to copper mining, and the agropastoral way of life coexists with three private mining operators: this example raises the question of how to reconcile subsoil law with regional planning, the preservation of cultural identities and ecology.

She points out that in many Latin American countries, concession law is autonomous, and that local administrative or environmental authorities intervene later in the concession award process, when technical feasibility studies have already been carried out by the operators. The result is a legal contradiction between soil and subsoil rights, property rights and communal and concession ownership, leading to socio-environmental conflicts between mining operators and local populations.

Ms. Rey-Coquais recalls that the 1990s institutionalized these issues in Peru and Chile, thanks to a normative revolution initiated by the mining industry itself with environmental impact assessments, and then with the help of international donors and foreign powers. In the 2010s, Chile set up a Ministry of the Environment and an Environmental Tribunal, bringing the public player into the mining sector. However, there is a weakness in this system: environmental institutions are completely dependent on political and economic issues.

In the meantime, NGOs have helped set up citizen environmental knowledge foundations that mobilize in networks to help local populations find new ways of taking ownership of the land. We are therefore witnessing a reconfiguration of the way we think about integrating local populations into the design of mining projects, which could lead to a process of co-construction upstream of environmental impact studies.

[Nicolas LECONTE, Critical Metals and Energy Transition Advisor Economic Diplomacy Division, Ministry of Europe and Foreign Affairs](#)

As representative of the French Ministry of Europe and Foreign Affairs, Mr. Leconte brings a more institutional perspective to the issue, that of mineral diplomacy. He points out that the

European Union has drawn up a list of thirty-four critical metals needed for strategic industry, and that these metals play a key role in national and regional dependence and sovereignty issues.

He refers to the Critical Raw Materials Act currently under discussion in Europe, a region with a modest mining sector, and which is therefore not confronted with these issues in the same way as other countries with larger mining industries (USA, Australia, Canada). He briefly reviews the history of the raising awareness of the need to secure supplies of critical metals, and refers to the 2021 World Energy Outlook, which estimates that consumption of critical metals linked to the energy transition would be multiplied by 4 according to the objectives of the Paris Agreement. Covid and the situation in Ukraine also caused tensions in the supply chain, driving up prices.

The Varin report (January 2022) marked an important formalization: it enabled the creation of the French Mineral Resources Observatory (OFREMI), which aims to assess vulnerabilities linked to mineral resources in France, the launch of an R&D roadmap on the development of battery technologies, the creation of a €2 billion critical metals investment fund, and the establishment of a mineral resources diplomacy to secure France's critical supplies in a context of increased competition between states and companies.

Finally, he presents the university and R&D cooperation program that supports mining governance projects via BRGM through bilateral agreements to move up value chains, and highlights the European industry's will to ensure the acceptability of the projects before launching them.

**May 26th**

[Round Table 2 - Thinking about a "just transition" from one end of the supply chain to the other: raw materials, jobs and social protection](#)

Moderator: Claude LE GOUILL, research fellow at IRD-SENS. UMR SENS (IRD / CIRAD / Université Paul-Valéry Montpellier 3)

After a few words of thanks, the moderator invites the participants to consider the notion of "just transition" and its implications: a transition to a post-carbon society to cope with new global environmental risks. He points out that this implies breaking with the relationship of domination and North-South inequalities. Similarly, the theme raises the question of how the valorization of raw materials can contribute to the emergence of a new extraction industry that addresses social, spatial, global and environmental justice. However, he points out that each player understands this notion in a different way, and that it carries an inherent contradiction: to achieve a post-carbon society, more natural resources need to be extracted. Similarly, the question of work is sometimes invisible as communities don't have access to the technology they produce.

Froujke BOELE, Head of Public Policy and Regional Programs, OECD Centre for Responsible Business Conduct

This speaker explains that the OECD Center for Responsible Business Conduct works with, business and stakeholders on implementing guidance for businesses to minimize adverse impacts on operations and supply chains, that materialized in the OECD guidelines for multinational enterprises for them to identify, address and mitigate any adverse impact in their operations.

She then recalls some of the key social and environmental human rights impacts regarding the just transition and Latin America, but also calls to take into account the social and labor impact of the consequences of phasing out of high carbon intensive industries, as well as the financial resources needed to ensure a pathway to this transition. She talks about the abundant metal and mineral resources that lie in Latin American and Caribbean soil, as they offer various opportunities but convey a lot of major risks that have been revealed throughout history.

The regional report on responsible business conduct risks related to the mineral sector released by the OECD last year shows that these issues are often intertwined with bigger political and economic questions. Another aspect that should be taken into account is the



extent of artisanal and small-scale mining that plays a huge role in the employment of these areas but has no public oversight nor social protection.

In order to meet climate requirements and secure a reliable source of critical minerals, Ms Boele explains that the supply chains need to diversify, as for now 50% of cobalt, copper and nickel extraction sites are located in areas with significant government challenges and near indigenous lands.

In that sense, she highlights that the OECD standards can contribute to the solution, as they are to be updated to align with the Paris Agreement and states that the companies are expected to reduce greenhouse gas emissions. 51 countries have adhered to the OECD guidelines for multinational enterprises, including non-OECD members and various Latin American countries. The OECD has also been working with businesses about these issues and provides them with practical tools and guidelines to promote investment and prevent disengagement. She concludes that these standards are voluntary but have been implemented in Europe, and the business in other regions need to comply with these rising expectations.

#### [Gilles RECOCHE, Director of Responsibility, Commitment and Communication, Orano Mining](#)

In this round table, Mr. Recoche gives the point of view of an actor of the mining sector. He explains that his company does not work with Latin America, but that certain themes are common to all territories. He reminds us that Orano's mission is to supply natural uranium to produce carbon-free energy. Their main commitment is to ensure security of supply thanks to a diversity of territories of origin, which means adapting their vision and way of doing things to each project. What's more, they are committed to providing customers with a twenty-year vision, and he points out that their customers represent 80% of the world's electricity suppliers.

He went on to quote some figures for Orano, which employs 90% of its staff outside France, 98% of whom are local workers and 2% expatriates, whose skills are gradually being transferred to local populations. Orano is one of the world's top three uranium producers, accounting for 15% of global production. Their specificity lies in their awareness that the mineral resources they exploit will reach an end, and their commitment to post-mine projects

to ensure the environmental, economic and labor transition of the regions concerned, in France and worldwide.

He emphasizes that their projects are long-term, and cites a new mining project in Mongolia after twenty years of presence and ten years of discussions.

He believes that corporate social responsibility is a key issue, as the extraction process is necessarily done abroad since France no longer has any uranium mines; it involves articulating French rules with local ones, as well as developing projects that are feasible, viable and livable from an economic, environmental, social and governance point of view. This means taking the time to build trust with all stakeholders and partners. A responsible approach guarantees the viability of the project, for it has an impact on the company's image and employee satisfaction. The best way to do this is to anticipate, by reaching out to stakeholders to draw up action plans based on short, medium and long-term issues and risks. It is essential to think about the reconversion of an area after mining, and to show that the population will be supported in this process.

#### [Kim AUMONIER, Project Manager - Capacity Building, SHERPA](#)

She points out that she has worked for several years with communities affected by mining projects, and that she now represents SHERPA, a French civil society association and organization of jurists that fights against forms of impunity linked to the globalization, and proposes a pioneering vision of law and legal innovations to strengthen the responsibility of economic players. To this end, SHERPA engages in national and international advocacy and litigation to advance jurisprudence, as well as legal research and capacity-building with other players to establish a binding legal framework at European and international level. She points out that human and environmental rights abuses in the context of mineral extraction are still numerous around the world today (around 500 allegations in Latin America alone, mainly in Chile and Peru), and that the question of responsibility also arises for players and projects that preceded the transition. At the same time, some players are shirking their responsibility by reselling projects that are no longer compatible with the transition expectations to other economic actors, who are simply perpetuating them.

She therefore insists on the need to change the economic model that encourages governments to opt for less restrictive regulations, through complex value chains. She invites everyone to read the Centre for Research on Multinational Corporations (SOMO) report on the regulation of raw materials and calls for a legal framework for multinationals and governments. She also points out that SHERPA was one of the players behind the French law on environmental duty of care in 2017. In Europe, the directive on duty of care is currently being negotiated, and SHERPA recommends taking into account the notions of decent wage, health and safety at work, as well as integrating the entire value chain into considerations and providing access to justice for victims.

As far as Latin America is concerned, the OAS highlights the same issues in its report on economic, social and environmental rights.

[Fernando ANDRADE HENAO, Regional Climate Change Specialist for Latin America and the Caribbean, United Nations Development Program](#)

Mr Andrade Henao begins by saying that there is no universal definition of what a just transition is, and that for the UNDP it is all about practices. If we have to try to define it, he refers to the International Labour Organization's definition: greening the economy in a fair and inclusive way for everyone concerned, creating decent work opportunities and leaving no-one behind, which does not really address the process of the decarbonization of the economy.

UNDP's framework works with principle, process and practice through four main pillars: assessment, engagement, finance and institutional capacity. The just transition is one of the instruments for the achievement of the Paris Agreement goals. In regard to the national determined contributions (NDC) and long-term strategies (LTS) defined in the agreement, the UNDP analyzed that Europe and Asia are the regions that are making a reference in decarbonization strategies, while the Americas and the Caribbean are second.

He highlights that six Latin-American countries are actively working on just transition and therefore receiving support from the UNDP through the Climate Promise, its international initiative. He adds that they also implement a methodology, the Climate Budget Tagging,

aimed specifically at climate finance, and that they are starting to work on a just energy transition dialogue in Latin America.

He cites UNDP's work about green jobs and road transport assessment in Antigua and Barbuda as an example of how these policies translate in new challenges: the policies need to upscale and rescale the labor force to transition in a fair way, through social dialogue. In this regard, the example of Zimbabwe is also very enlightening.

He states that 24 million jobs could be created by 2030 in the transition to a green economy, but it could reach 122 million by 2050 if this transition gets the proper investment, but there is a global need for data to assess the needs and create policy coherence on a global scale.

### Round Table 3 - Integrating value chains and imagining (bi-) regional cooperation: what geopolitics for raw materials?

**Moderator: Raphaël DANINO-PERRAUD, Associate Researcher, IFRI**

The moderator thanks the organizers for inviting him to moderate this round table and discussion. He emphasized that the issues at stake in the title are at the crossroads of the challenges and contradictions of globalization that we are experimenting on a daily basis: for example, local mining production transformed in another region and used in a third to produce local energy. Producing countries want to reappropriate these resources, while other countries want to import them at lower cost and diversify their supply. All this is taking place in a global context of pressure on these resources (rise in consumption, declining productivity, environment and climate).

**Natascha Nunes DA CUNHA, Extractive Industries Specialist, Inter-American Development Bank**

The speaker begins by stressing that the world is in a state of global climate crisis and underlines the urgency to act collectively with differentiated responsibilities, as the critical resources that enable this energy transition play an important role in the Latin American economy. She then provides some examples of critical metal production in the continent:

Mexico produces silver for windmills, Panama is the ninth largest copper mine in the world, Chile and Peru produce 50% of the copper traded in the world, gold and bauxite are extracted in the Caribbean.

She explains that the IDB's premise is to consider that mining has the potential to generate sustainable development despite the fact that it is a risky sector: the sector can be thought of strategically in favor of local development and decarbonization processes by establishing favorable conditions for responsible investment.

Latin America is seen as a region that has not known how to use its resources responsibly, but there is a potential for collaboration with Europe and development agencies within institutional regulatory frameworks to regulate exchanges efficiently and with high standards. In fact, she insists that Latin American regulations have to accompany industry standards, modernize them and have the capacity to verify that companies are complying with them.

She reminds that the impact and conflict is stronger at the local level, that it is necessary to ensure that production also generates local development (tourism, agriculture, etc.) and contributes to the resilience of the mining territories.

She concludes by saying that if Latin American companies occupy more space in the value chain, the benefit will be mutual.

#### [Corina HEBESTREIT, Director, European Carbon and Graphite Association](#)

The speaker has spent twenty-two years working in the mining industry and lobbying in Brussels to have a Critical Raw Materials Act passed in Europe, and she is happy that the critical raw materials analysis allowed society to understand the needs.

She proceeds to say that she will focus on natural graphite in her talk since the association she represents focuses on that material: the E.U. now has 3% of natural graphite and aims to reach 40% by 2030. Ms. Hebestreit highlights that the long perspective has to be kept in mind, since the needs may vary in the next thirty years and the search for alternatives and replacement for graphite should be searched. She then explains that the word “decarbonization” is confusing, as graphite is carbon, but the real issue is carbon dioxide and not carbon.

As for company governance and responsibility, she asserts that the European Union is undermining its own ambitions with the Industrial Emissions Directive, which governs the

permits based on documents that describe the Best Available Technology (BAT). In this regard, there is a need for a global discussion about graphite mining if these BAT documents are to hold any worth in the industry. She also states that the revision of the non-ferrous note may have counterproductive consequences if the limits set are too low and forces the E. U. to purchase elsewhere. Therefore, she once again insists on the need of global cooperation between all the parties.

She ends up citing some of the measures that the ECGA implemented as part of a solution such as establishing graphite specific due diligence guidelines based on the OECD guidance and providing consultancy and assessment for graphite production.

[Mouna TATOU-BRETON, Deputy Head of Office, Mineral Resources Policy Bureau, Ministries of Ecological Transition and Territorial Cohesion, Energy Transition and the Sea](#)

The presentation begins by pointing out that recent tensions linked to the war in Ukraine and covid have highlighted vulnerabilities and dependencies linked to raw materials. As head of the Secure Supply Division, Ms Tatou-Breton explains that the national strategy, in France and Europe, is based on knowledge of resources, the development of capacities and the establishment of bilateral and multilateral partnerships. The strategy is based on a number of priorities: increasing knowledge of the value chains (she cites the setting up of the OFREMI observatory), assessing the availability of resources in the country thanks to BRGM, strengthening R&D to limit the use of raw materials that are not available in Europe, and supporting transformation and transition projects through initiatives such as the Metals Fund. She also points out that many administrative players are working on mining issues in France, and that this is an important issue for the government.

She mentions that initiatives are under discussion and negotiation at European (Critical Raw Materials Act) and international levels, notably through the creation of bilateral and multilateral partnerships that strive to mutualize value chains for consumer countries.

This aspect of metals diplomacy involves several bodies: international organizations (World Bank, OECD, International Energy Agency, International Renewable Energy Agency...) and initiatives created within the framework of the G7 and G20, the Extractive Industries Transparency Initiative and the Minera Security Partnership.

In Latin America, Argentina and Chile are among France's most important partners, with whom the government is developing scientific and university cooperation programs, an R&D partnership to support industrial projects, and convergence research projects on social and environmental standards.

[Eduardo GUDYNAS, researcher, Latin American Center for Social Ecology \(CLAES\)](#)

His intervention deals with the geopolitics of raw materials respecting Latin America. He begins by presenting the factors that are external to the continent: the demand for natural resources went from 500 million tons exported per year to more than one billion tons in a decade and the deficit in the physical balance has been increasing steadily since the 1990s. In addition, consumption patterns linked to the energy transition directly affect trade in raw materials.

With regard to the internal factors, the speaker emphasizes Latin America's subordination to exports, which has an enormous weight in national economies, with a weak industrialization of its own and an addiction to imports of manufactured products. As a result, unequal trade patterns are maintained. It also underlines the growing importance of the Chinese market in this external subordination, to the point that the decisions of the Chinese communist party become more important than those of Brussels. This implies a reconfiguration of globalization. He insists that the urgency the continent is facing today is to address local social and economic impacts independently of the global climate issue. Alternatives are urgent and necessary, regardless of the emergencies in other continents. He explains that bilateral trade agreements in Latin America maintain these ambivalences: for example, the agreement between the EU and Chile, approved in December 2022, indicates that Chile provides the lithium necessary for the European energy transition while the work will be carried out in Chile by European companies.

He then calls for Latin America to disengage from global subordination without isolating from international trade logic, by taking into account regional autonomy and socio-environmental criteria, with a view to a post-extractivist transition that shares resources within the same region in order to avoid conflict.

**Conclusions by the scientific coordinators Yvanne Bouvet (Université de Bretagne Occidentale) Audrey Sérandour (Université de Haute-Alsace, CRESAT, PRODIG)**

The two scientific coordinators would like to thank all the organizers, participants and moderators, as well as the audience for the rich exchanges that took place over the last two days.

They point out that the main objective of the event was to reflect on trade relationships between Europe and Latin America and the Caribbean, with a focus on raw materials after several centuries of imbalance. The common thread running through the event was the energy transition and the shift from a fuel-centric production model to one that favors energy converters and their storage devices, which require large quantities of raw materials. This context calls for a rethinking of intercontinental and interregional relationships, between Europe, Latin America and the Caribbean, as new geopolitics of raw materials takes shape: new spaces and players emerge, without sweeping away those already present. The scientific coordinators point out that Europe has only recently rediscovered the stakes involved in raw materials, whereas in Latin America these are long-standing logics that have fuelled the imagination and generated social and environmental conflicts right up to the present day. The two regions therefore have different apprehensions and expectations of the situation.

Overall, the reflections gravitated towards a few considerations: firstly, understanding that each player has its own definition of the notion of transition, and that all players are communicating sincerely to consider a “just” transition. Energy transition is largely driven by the European Union, which sets part of the rules and framework for trade, without questioning the extractivist model that continues to prevail in the raw materials supplying countries.

Secondly, the question of the value chain, its redefinition and could be the subject of fruitful dialogue between European, Latin American and Caribbean countries, as a means of initiating a "just" transition. Understanding how the balance between production and costs at all stages of the value chain can help build industrialization strategies on both sides of the



Atlantic, while Europe is currently seeking to relocalize its mining and industrial production, while Latin American countries wish to move away from the role of mere suppliers and industrialize their economies.

Other questions and issues arose: the need to secure trade to guarantee the European socio-economic model and maintain trade that supports development in Latin America, and the establishment of international standardization norms to ensure good social and environmental practices on a global scale and at all levels concerned: inter-regional, infrastructural, local and operational.

The conclusion that emerges is that none of these regions is homogeneous, whether in Europe, Latin America or the Caribbean; a wide range of practices and actors engage in various strategies there.

The event closes with a key question: how can sovereignty over resources and national interests be reconciled with regional strategy? Which players ultimately have the power to structure the raw materials trade? And which aspects should take precedence when setting up cooperative ventures? It is through this logic of constant questioning that the academic sector finds its place in these mechanisms.

Finally, the scientific coordinators remind us that the post-growth perspective is also a way of envisaging an exit from the extractivist model and limiting our need for raw materials. They call on us to question our relationship with nature, to understand that it offers not only resources, but also amenities that are to be protected.