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The Lobito Corridor: Between European geopolitics and African agency

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The Lobito Corridor initiative – connecting the Democratic Republic of the Congo, Zambia and Angola in Southern Africa – is seen from a lens of geopolitical competition between the European Union (EU) and the United States on one side and China on the other, with a particular focus on access to critical raw materials.

This paper examines that framing in terms of the financial viability of the investment and in terms of private sector activities, as well as the dynamics and interactions between and within the corridor countries. This latter aspect has so far been overlooked, leading to insufficient consideration of the agency of the corridor country governments and other actors. Incorporating insights from policy and literature analysis as well as interviews conducted in the three corridor countries, this paper therefore explores the critical question: Which actors and factors determine the success and viability of the Lobito Corridor?

We find that, despite the rhetoric on the EU's pursuit of critical raw materials through the Lobito Corridor as an alternative to reliance on China, in reality there is limited clarity on actual investments along the corridor. Moreover, strong Chinese presence and firm capabilities – combined with the fact European and Chinese businesses are in practice deeply intertwined – make China's involvement difficult to avoid. In addition, the motivations of different African actors, starting with African governments, vary widely. While this is not necessarily problematic, it does raise concerns that the political prioritisation of the steps needed to make the corridor a success will vary between countries.

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This paper is part of a wider research project examining the narratives on the EU and China in Africa. It follows a previous paper by Di Ciommo et al. (2024), on country-wide perceptions of EU support, by zooming in on the much-discussed Lobito Corridor.

The views expressed in this paper are those of the authors and do not represent those of ECDPM or any other institution. Any errors or omissions remain the responsibility of the authors. For comments and feedback, please contact pk@ecdpm.org

Acronyms

AfCFTA	African Continental Free Trade Area
CRMs	Critical Raw Materials
DRC	Democratic Republic of the Congo
EAC	East African Community
EC	European Commission
EU	European Union
EUD	European Union Delegation
EV	Electric Vehicle
LAR	Lobito Atlantic Railway
LCTTFA	Lobito Corridor Transit Transport Facilitation Agency
MoU	Memorandum of Understanding
PGII	Partnership for Global Infrastructure and Investment
REC	Regional Economic Community
RVC	Regional Value Chain
SADC	Southern African Development Community
TVET	Technical Education And Vocational Training
US	United States of America

Executive summary

The Lobito Corridor initiative, connecting Angola's Lobito port to the copperbelt in the Democratic Republic of the Congo (DRC) and Zambia, is largely framed within a narrative of geopolitical competition: the European Union (EU) and the United States (US) are said to be vying with China for access to critical raw materials (CRMs) essential for the global green transition. However, deeper examination reveals the complex reality of multiple factors at play on both the EU and African sides, challenging the simplicity of this geopolitical framing. To begin with, it includes different things – a brownfield railway connecting Lobito (Angola) to Kolwezi (DRC), and greenfield railway line connecting Lobito (Angola) to Chingola (Zambia), with a long term goals of connecting the greenfield line to the existing TAZARA connecting to Dar es Salaam. The commercial viability, especially of the greenfield railway, remains unclear.

While the geopolitical rhetoric emphasises competition, implementing the corridor on the EU side presents several challenges. Firstly, despite several announcements, the corridor's infrastructure, including the greenfield railway, and related projects lack sufficient investment to achieve the stated ambitious goals. Secondly, substantial Chinese presence in the region's mining and infrastructure sectors adds complexity to the idea of competition. Instead of presenting an alternative, European and US firms frequently connect into existing and expanding Chinese investments and supply chains. This intertwining of commercial interests makes it difficult to establish separate and distinct Western and Chinese supply chains, despite geopolitical rhetoric. Thirdly, while there is a commitment to broaden the Lobito Corridor's use-case beyond minerals to agriculture, energy, and other sectors, thus aligning with the development aspirations of partner countries, the Lobito Atlantic Railway (LAR) consortium, operating the existing brownfield railway, is primarily focused on mineral transport. This misalignment risks limiting the corridor's future potential for wider socio-economic impact. Fourthly, the EU's focus on "norms and values" could create tensions if not balanced with economic upgrading. These values, while important, are sometimes perceived as imposed and inconsistently applied in Africa, leading to frustrations and accusations of double standards.

In addition, the interests of the Lobito Corridor countries are more nuanced than the above broad narrative suggests. Firstly, all three corridor countries – Angola, the DRC, and Zambia – are wary of being drawn into a West-China rivalry, especially given their historical experiences during the Cold War. Consequently, they pursue a pragmatic approach, seeking balanced relations with both the West and China, leveraging partnerships for their own development goals. For the

DRC there are also some frustrations with the EU and their relations with Rwanda. Secondly, trade among these countries is low, raising questions about the extent to which the Lobito Corridor can spur regional value chains, even if this is envisaged under the African Continental Free Trade Area (AFCFTA). While industrialisation and value addition remain policy priorities, such as the DRC-Zambia battery precursor plant initiative, concrete progress there has been limited while connections to the rail link are questionable - political interests are focused on national gains rather than collective, coordinated regional development. Thirdly, despite the desire to move beyond a purely mineral-dependent economy, there is a lack of state capacity to turn these ambitions into action. The need for broader economic development, including in agriculture, is recognised, but translating this into concrete policy and investment strategies remains a challenge.

The viability of the Lobito Corridor hinges on actions of the EU as well as its African partners. Instead of framing the initiative as a competition with China, and recognising the interconnectedness of Western and Chinese businesses, the EU should focus on offering concrete, complementary support that aligns with the development needs of Angola, the DRC, and Zambia. There is a need to integrate various instruments beyond development cooperation to create a more compelling offer. This requires more coordination between Brussels and European Union Delegations at partner country level, between the different Directorate Generals at the European Commission and between the Commission and the private sector. Crucially, investments in CRM processing within the corridor countries are essential to ensure both commercial viability and political feasibility of the corridor.

For African partners, this addresses their desire for value addition and moving beyond simply exporting raw materials, but to maximise benefits, they must proactively shape the initiative's trajectory. Apart from investments in CRM processing and setting realistic expectations, they must prioritise agriculture and other sectors to diversify their economies. Strengthening regional cooperation would be essential to address trade barriers, harmonise regulations, and improve border management, thereby maximising the corridor's potential for regional value chains and economic integration. It is through such regional cooperation that (different) national interests can be met, while holding all partners accountable for their commitments, and deliver sustainable development.

1. Introduction

The Lobito Corridor links Zambia, the Democratic Republic of Congo (DRC), and Angola's hinterland to the port of Lobito. Though not a new initiative, the corridor is a rising star in international development discussions. Since European Commission (EC) President von der Leyen first announced the European Union's (EU) plans to work with the United States (US) in September 2023 under the G7 Partnership for Global Infrastructure and Investment (PGII) (EC 2023a), later joined by Italy under their G7 Presidency (G7 2024), the initiative has attracted headlines.

Within these discussions, the Lobito Corridor is often framed in terms of 'geostrategic competition' between 'the West' and China.[1] For the EU, the Corridor provides access to 'critical raw materials' (CRMs), in particular copper and cobalt from the DRC and Zambia, serving several purposes i) lower dependency on China for these materials to ensure strategic autonomy; ii) accelerate the green and digital transition; and iii) boost competitiveness in cleantech manufacturing.

African governments seek to benefit from their minerals, regardless of geopolitical rivalries, to harness "green mineral value-chains for equitable resource-based industrialisation and electrification, creating green technologies and sustainable development to enhance the quality of life of its people" (AU 2025). The potential benefits of the corridor beyond minerals are also increasingly highlighted.

Fostering mutually beneficial partnerships is a key goal of the external dimension of EU's policies. The Lobito Corridor has come to represent how the EU seeks to combine a series of internal policy concerns with partnerships that aim to support socioeconomic development, thus on paper aligning with African ambitions to promote market integration and industrialisation. This comprehensive approach is put forward through the Global Gateway strategy (EC n.d.) and aims to combine EU development with geopolitical and economic policy objectives.

Therefore, in principle, the Lobito Corridor satisfies a wide range of EU and corridor country interests. However, that interpretation rests on assumptions that require further analysis. These relate to the underlying market and trade dynamics of the minerals in question; the commercial viability of the planned railway investments; the levels of interest and demand from firms and people in the corridor countries for industrial development and regional cooperation to bring down trade times and costs; but also potentially to interests in agricultural investment; and the political dynamics within and between the corridor countries.

[1] Despite the heightened tensions between the EU and the US at the time of writing, the Lobito Corridor has externally been framed in terms of 'Western' competition with China.

Past studies on transport corridors suggest that 'success' hinges on the political dynamics, incentives and interactions between and within key actors along transport corridors (e.g. Lamarque and Nugent 2022). Current debates seem to overlook this aspect, thereby failing to take account of the agency and interests of African countries beyond the Heads of State who have signed the various agreements. All of these point to the need for policy makers and international partners to have a better understanding of the political and economic interests, and incentives that shape the interests and incentives within and between Lobito Corridor countries, including with international partners such as the EU and China.

This study discusses these actors and interests, analysing the *within* and *between* country dynamics of the Lobito Corridor, but framed in the wider context of EU and China geopolitical competition, to look at both the rhetoric and actual engagements. More specifically, it seeks to identify and discuss:

- where there is genuine political traction and a commercial interest from key companies between and within countries;
- where there may be potential blockages, whether from companies, politicians or bureaucrats who benefit from the status quo;
- implications for governments and international partners seeking to achieve shared development outcomes through the Lobito Corrido process.

The remainder of the paper is organised as follows: Section 2 presents the Lobito Corridor ambition and logic, through the lens of the key international actors, the underlying logic from an African perspective, and the way the initiative has been set up institutionally. Section 3 presents some of the challenges arising, particularly when looking at different actors and interests around the corridor initiative. Section 4 summarises and concludes.

2. The Lobito ambition

2.1. The logic

On paper, the Lobito Corridor responds to a range of African and external interests. This section presents the drivers shaping EU interests, how they align with African ambitions and the extent to which they are achieved with a corridor approach.

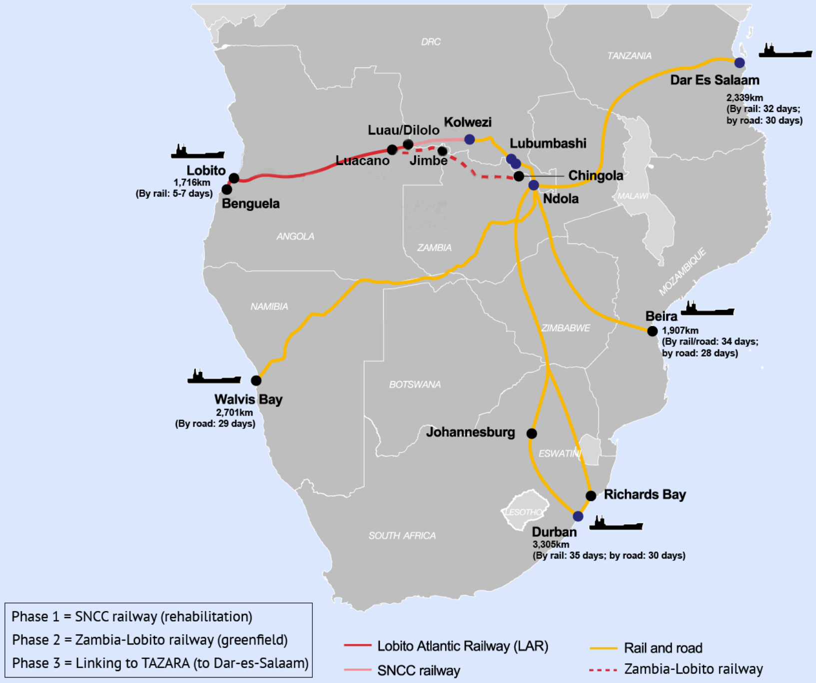
Box 1: What is the Lobito Corridor?

The Lobito Corridor has a brownfield and a greenfield part. As Figure 1 shows, the Angolan section or the Benguela Railway (in red) connects the port of Lobito to the Angola-DRC border at the Luau-Dilolo. Refurbished in 2006-2014 with a Chinese loan, it is operated by the Lobito Atlantic Railway (LAR) and requires some additional work. This, together with the Congolese section to Kolwezi (in pink) which needs refurbishing, is the brownfield (phase 1) Lobito Corridor.

As Ball (2015) explains, the Benguela Railway (Caminhos de Ferro de Benguela) was privately built (1903-1929), owned and operated under Portuguese colonial rule, with ownership transferred to the Angolan government in 2001. It connected to the Congolese Railway (built and operated by the then Chemins de Fer Bas Kongo au Katanga, which is now subsumed under the Société Nationale des Chemins de fer du Congo (SNCC) - Congolese National Railway).

There is also the planned greenfield rail extension (phase 2, dotted line) that would connect the Angolan line directly to Zambia via Solwezi and Chingola.

Figure 1: The Lobito and other Southern African Corridors



Source: *Authors, based on Trafigura*[2]

[2] https://www.trafigura.com/news-and-insights/case-studies/metals-and-minerals/lobito-atlantic-railway/

A long term goal of the Lobito Corridor project, as expressed in the MoU, is also to connect the end of the Lobito-Zambia rail line at Chingola to the TAZARA rail line terminus at Kapiri Mposhi, about 200km away, to form a 'Trans African Corridor' linking the Atlantic and Indian Oceans (phase 3).

Geopolitical corridor competition

European relations with Africa are, and will increasingly be framed by the EU along lines of self-interests as it seeks to navigate the challenges affecting its economy, industry and society. This is evident from the i) Global Gateway strategy, which aims to "create opportunities for the EU member states' private sector to invest and remain competitive" (EC n.d.); ii) the Draghi Report on Europe's competitiveness (EC 2024a); and iii) the political guidelines for the new 2024 Commission (von der Leyen 2024). There is also a shift from a geopolitical Commission in 2021, to an investment Commission in 2024 to prepare the EU to respond to a world framed by geostrategic rivalries (EC 2024b).[3] The shift comes in addition to the EU's CRMs Act (EC 2023b) that lays out a series of measures and targets to reduce the EU's dependency on any one country for a number of CRM sources and thus the need to diversify.[4]

This shift comes, to a large extent, in response to an increasingly fractious geopolitical landscape and initiatives coming from the US and China. Following the US elections, the EU has accelerated certain provisions to strengthen trade and economic ties with third countries - from Malaysia to the Mercosur - in an attempt to hedge its bets and build specific partnerships with multiple countries, including those in Africa (Corlin 2025; EC 2025a). This trend is likely to accelerate following the US led tariffs war (Lange 2025). Within this context, and even if narratives sometimes differ between Brussels and EU Delegations (EUDs) in partner countries, China is often perceived or framed as a competitor and a rival in terms of trade, technology, and security (Di Ciommo et al. 2024; Jones et al.

[3] Although the mission letter for the new trade and economic security commissioner cites a need to 'continue work with African partners to facilitate trade and promote sustainable investments', the broader text references a need to 'drive our prosperity but also drive down our dependencies'; 'a more assertive stance on defending ourselves from unfair competition or security risks'; and 'trade policy should focus on the core objectives of competitiveness, security and sustainability'.

[4] "The Act identifies a list of strategic raw materials, which are crucial to technologies important to Europe's green and digital ambitions and for defence and space applications, while being subject to potential supply risks in the future" (EC 2023b).

2024).[5] While recently there has been some softening of language vis-à-vis China (Von der Leyen 2025; Government of China 2025), the EU continues to "seek more strategic autonomy and to de-risk economic relations and supply chains".

This thinking underpins the EU's Global Gateway initiative which seeks to increase EU investments, including in connectivity. Even if it was not among the 11 'Global Gateway Strategic Corridors' (Lavalle et al. 2022), the Lobito Corridor quickly became the most visibly important corridor for the EU in Africa under this strategy following the EU-US joint efforts under the G7's PGII (The White House 2023). Some of its EU member states have also sought to align their national approach with that of the G7 to develop this corridor, as reflected in Italy's Mattei Plan (G7 2024).

Apart from the joint US-EU efforts, EU interests are also reflected in a range of other agreements and partnerships – focusing on both CRMs, infrastructure investments and beyond. In addition to the seven-party Memorandum of Understanding (MoU) signed between the EU, the US, Angola, DRC, Zambia, the AfDB and the AFC to develop the Lobito Corridor in October 2023 (Lobito Corridor MoU 2023), the EU has signed strategic partnerships on critical minerals value chains with the DRC and Zambia respectively (EC 2023c). These complementary agreements provide a further angle through which the EU hopes to use the Lobito Corridor to improve its mineral access. These are separate to the US-DRC-Zambia MoU (Géraud-Neema 2023) to support the development of a EV battery value chain, which in turn builds on the bilateral cooperation agreement between the DRC and Zambia to develop this value chain (UNECA 2022).

The geopolitical competition aspect of the Lobito Corridor is further bolstered by Chinese plans to upgrade the existing TAZARA Railway (Mark 2025). That line connects broadly the same hinterland *eastward* to the Tanzanian port of Dar es Salaam (TAZARA 2024). This comes after Chinese firms failed to win the concession to manage the Benguela Railway that forms the Lobito Corridor (Railway Gazette International 2022). Indeed, Chinese firms upgraded the Angolan section of the railway in 2014 (World Bank 2024) before handing it to the Angolan government in 2019 (Xinhuanet 2019).

[5] EU officials at the country level in the EU delegations (EUD) are more cautious of framing their approach as 'countering' China or juxtaposing the Global Gateway with the Belt and Road Initiative, as they realise this is counterproductive (Di Ciommo et al. 2024). Indeed, according to Yuyuan (2024) the 'competition' narrative may distract from genuine complementarities that build on individual strengths (e.g. construction and financing on the Chinese side, and investments and management on the EU side).

African corridor ambitions

African governments have long used trade and transport corridors as a means to promote market integration and industrialisation. This rationale holds at the level of regional economic communities (RECs), where corridors are seen as a key implementation mechanism for the African Continental Free Trade Area (AfCFTA) (AU 2024). The Lobito (development) Corridor was already one of six priority corridors identified in the 2012 SADC Regional Infrastructure Development Master Plan, long before the US, G7 and EU prioritised it.

There is a compelling case that the Lobito Corridor could cut travel times and distances for minerals to get from Zambia and the DRC to port. This logic underpins the Lobito Atlantic Railway (LAR) consortium in the partnership MoU and in much public analysis - reports state that "the revamped railway will slash transit times from the DRC to Lobito to under 36 hours" (for example, Sanchez 2023), while others talk of cutting times from one month on the road to Durban to 8 days (for example, Gerding 2024). Figure 1 provides estimated distances and times from Kolwezi in DRC by road and rail across different corridors, showing the Lobito Corridor's advantage. Mining company Ivanhoe, exporting copper concentrates from Kamoa Kakula Copper Complex currently trucks its copper concentrates by road to the ports of Durban in South Africa, Dar es Salaam in Tanzania, Beira in Mozambique, and Walvis Bay in Namibia (Bentham 2024). The fact that the Lobito Corridor, specifically the brownfield Benguela railway extension to Kolwezi (or phase 1 in Figure 1), offers the shortest distance and potentially rail time of all the corridors, and that there is currently no direct road from Kolwezi to Lobito, supports the argument to invest in rail. However, as will be discussed below, the distance and time to port is only one of many factors likely to shape the corridor's use case for firms.

Negotiations for the Lobito Corridor Transit Transport Facilitation Agency (LCTTFA) began between the corridor countries' Ministers of Transport and Corridor Development in 2013 (World Bank 2024). This was eventually signed in January 2023 with the objective of harmonising laws, regulations and systems for corridor infrastructure with the provisions of the SADC Treaty, Protocols, and development frameworks like the SADC Regional Indicative Strategic Development Plan (RISDP), the SADC Regional Infrastructure Development Master Plan (RIDMP), and the SADC Industrialisation Strategy and Roadmap (SISR) (SADC 2023).

The combination of the above initiatives and institutional structures provide a backdrop to the seven-party Lobito Corridor MoU. It cites five areas of cooperation (Lobito Corridor MoU 2023):

1. integration of sustainable raw materials value chains;
2. mobilisation of funding for development of infrastructure;
3. cooperation to achieve sustainable and responsible production;
4. cooperation on research and innovation;
5. capacity building to enforce relevant rules.

The MoU lays out the "*possibility to work in collaboration to expand an economic corridor that will enhance regional trade and growth*, including, subject to economic, financial, environmental and social feasibility, by assisting the development of the following two Eastern sections of this corridor namely, the Luau/Dilolo to Kolwezi connection and a greenfield line connecting Luacano (Angola) to Chingola (Zambia), taking a step closer to the shared vision of connected, open-access rail from the Atlantic Ocean to the Indian Ocean" (ibid, italics added). Indeed, as Figure 1 above also highlights, the Lobito Corridor (both the brownfield and greenfield sections) fits into a broader network of regional trade and transport corridors in Southern Africa, many of which culminate in the resource-rich areas of Eastern DRC and the Zambian Copperbelt Province.[6]

But beyond simply redirecting raw materials away from the east coast to the west, Zambia and DRC, in particular, seek ways to add value to their minerals through investments in processing with plans for a joint battery precursor plant (Karkare and Medinilla 2023).[7] The MoU talks of an "*economic corridor that will enhance regional trade and growth*" (Lobito Corridor MoU 2023). The AfCFTA has also resurrected the goal of promoting industrialisation through trade and regional value chains (RVCs), thus raising a challenge for infrastructure and trade investments along the Lobito Corridor to align with wider African interests of higher value addition to minerals.

2.2. Realising 'the ambition'

In 2022 the Lobito Atlantic Rail (LAR) – a consortium of European firms (see Box 2) – won a 30-year concession to operate, manage and maintain the rail infrastructure and transport of minerals inside Angola (Schipani 2024). As Figure 2, which summarises key moments in the corridor, shows this preceded the seven-party Lobito MoU.

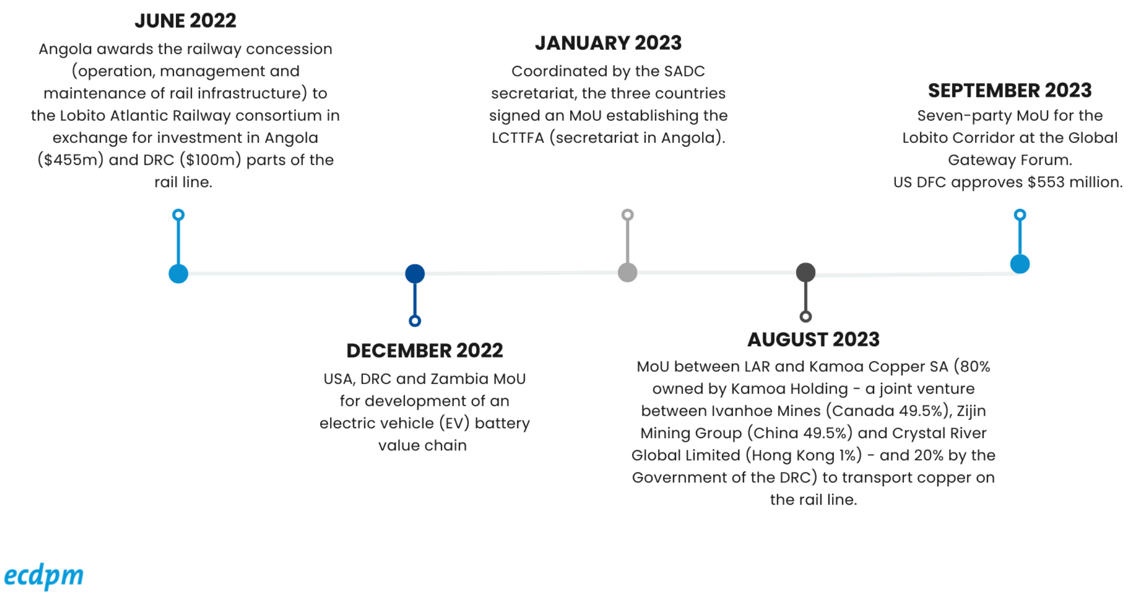
[6] Figure 1 does not include the Maputo and Nacala corridors in Mozambique, which also connect with this network.

[7] Exporting raw materials brings Sub-Saharan African countries as little as 3% of the processed products' market value (Chen et al. 2024).

Box 2: The LAR consortium

The LAR consortium comprises Swiss commodity trader Trafigura, the Portuguese construction group Mota-Engil (both with 49,5% shares) and the Belgian railway specialist Vecturis (1% ownership share).[8] Over the lifetime of the concession the group has committed to invest US$800m, including US$455m dedicated to Angola (including 1,555 wagons and 35 locomotives, along with investments in training and skills) and US$100m for the DRC (rehabilitation of 80km of track and purchase of rolling stock) through Trafigura's subsidiary Impala (Trafigura 2023). Africa Global Logistics (AGL), who won the concession for Lobito port's container terminal, estimates that in a decade Lobito will account for 20% of the extended metal production going into and outside Zambia and Congo's Copperbelt (Hill 2024a).[9]

Figure 2: Timeline of commitments under the Lobito Corridor



Source: Authors' own

[8] Though Trafigura is a commodity trader, these firms often expand into logistics to retain profits which are derived from high volumes of trade (rather than high margins) and save costs by investing in warehousing, trucking and rail operations. Additionally, it is easier to do arbitrage in transport prices since they do not control mineral prices and so cannot do arbitrage in this segment.

[9] AGL is the new brand formed from Bolloré Africa Logistics and MSC (AGL 2023).

The first exports of copper destined for the US through Lobito took place in August 2024, taking six days from Kolwezi to the port (Trafigura 2024). This followed trial runs from DRC in January 2024 that took 8 days (Bentham 2024).

Given that the LAR concession covers only Angola, different sections of the full brownfield railway length operate differently and are at different levels of upkeep. While the Angolan side running from the Port of Lobito to Luau (1,344km) is functional, operated by LAR since January 2024, the rail conditions are poorer in the 450km stretch operated by the Congolese national railway (SNCC) between the Luau/Dilolo border and Kolwezi in the mining area (World Bank 2024).

A core part of the seven-party MoU is the new greenfield line between Luacano in Angola and Chingola in Zambia (phase 2, dotted line in Figure 1). This bypasses the DRC and crosses the border to the south of Jimbe. This greenfield section would result in 730km of new rail (270km in Angola, 460km in Zambia) (IFC 2019) with an estimated cost of $5b, making it the most expensive part of the Lobito Corridor endeavour. For this greenfield section, KoBold Metals has committed to anchor its commercial viability (KoBold Metals 2024).[10] The African Finance Corporation (AFC) has pledged $100m for the refinery and $500m in financing the railway line (AFC 2024). Additionally, Africa's first cobalt sulphate refinery, Kobaloni, is planned at the railway's terminus in Chingola (Hill 2024b), arguably further strengthening the case for this greenfield railway line.

More broadly, as this section conveys, the multitude of commitments and institutional frameworks around the Lobito Corridor represent a wide set of high ambitions across an array of international, regional, public and private actors and institutional settings. This further underlines the need to understand what is driving the different incentives and interests behind these.[11] The next section discusses key considerations for the Lobito Corridor from an EU and an African perspective, looking at the corridor countries.

3. From ambition to action

This section discusses potential challenges for the Lobito Corridor at three distinct levels: the commercial case for the corridor; considerations from an EU-external

[10] While an MoU is a commitment this is not the same as an off-take agreement. Moreover, the Mingomba mine that KoBold is currently developing will need at least 5-10 years before any production takes place.

[11] That said, given the early stage of investments, quality information is lacking. Indeed, according to the World Bank (2024), while several new projects have been introduced along the Lobito Corridor, none have sufficient information to carry out a cost-benefit analysis.

perspective; and considerations from the African perspective, looking in more depth at the interests and incentives within and between corridor countries.

3.1. Is there enough demand?

While the brownfield Lobito Corridor (i.e. Lobito-Kolwezi) can reduce transit times from mine to port, shipping costs remain high. According to some interviewees, they are indeed too high to attract end-users. Only a few ships call at Lobito Port, which is a secondary port, and there are even fewer direct calls, requiring goods to be transferred to larger ships at major ports and thus implying additional transport costs. In addition, while the feasibility study of the Zambia-Lobito greenfield railway to determine its commercial viability is not yet public, experts familiar with the project question the railway's commercial viability due to unrealistic assumptions (interviews, see also Box 3). Calculations reportedly rely on unrealistic forecasts of increases in exports or of the volumes that could/would switch from current export routes (interviews). Further, interviewees suggest that shippers prioritise reliability and predictability over shorter transit times, meaning that competition from other corridors will remain high and so casting doubt on the demand side from the mines for transport along the corridor.

Box 3: Gauging demand for the Zambia-Lobito greenfield railway line

To illustrate, production on the Mingomba mine by KoBold Metals is at least a few years away (see footnote 9) but envisages a volume of up to 300,000 tonnes per annum (KoBold Metals 2024). The cobalt refinery at Chingola by Kobaloni, even if commercially viable, will see volumes of up to 6,000 tonnes per annum of refined cobalt. These volumes by themselves are unlikely to create the commercial case for the greenfield railway line. Moreover, given the existing road connection between Chingola and Kapiri Mposhi before connecting to Tanzania (via road or TAZARA railway), potential exporters like KoBold or Kobaloni also have the option of transporting these goods via other routes. This further underscores the need for the greenfield corridor to be price competitive.

The viability of the greenfield Lobito-Zambia railway also depends on further investment and rehabilitation of the inter-mine network (of Zambia Railways Limited) to connect it to Zambia's existing mines and smelters - the current terminus of the Zambia-Lobito railway, at Chingola, is west of these key areas (interview). It is unclear to what extent these are also being planned for through the international partnerships, with potential risks of misalignment and gaps that would further undermine its commercial viability.

Traffic on the existing brownfield railway is also currently limited, with only two trains carrying copper from Ivanhoe every week (Carbó and Abebe 2024). Moreover, with upgrading and refurbishment efforts differing along corridor sections, some parts remain precarious. There has reportedly also been equipment theft - leading in August 2024 to a derailment of a LAR consortium train, carrying sulphur. While no casualties were reported, the fact that the trains loaded with copper to Lobito carry sulphur and fuel on their return journey to power the mines in Kolwezi raised safety concerns (Ibid.).

Demand for processed/refined CRMs in the US and the EU also remains unclear. The EU's own limited refining capacity poses a challenge for the Lobito Corridor's contribution to EU CRM supply chain security. European firms focus on downstream manufacturing and buy intermediate components, with limited incentives to refine domestically due to cheaper Chinese sourcing (Logan 2024).[12] Even if CRMs are likely to be exempt from the recent spate of import tariffs announced by the Trump administration (Benchmark 2025), corridor countries currently are excluded from initiatives like the Inflation Reduction Act.

While the EU has CRM partnerships with both the DRC and Zambia, its potential use of unilateral measures, like the Enforcement Regulation after its dispute with Indonesia over nickel export restrictions in that country, could send negative signals to mineral-producing countries and undermine EU efforts to secure deals with these resource-rich partners (Crochet and Zhou 2024).[13] Furthermore, lack of alignment on standards may cause CRM import delays, undermining the Lobito Corridor's benefits (Nogués 2024).

Doubts about the commercial case for the corridor based purely on minerals leads some to look at the use-case of the Lobito Corridor beyond minerals. This would align with the ambitions of the corridor countries. Indeed, beyond their transport, the Lobito Corridor also presents opportunities to firstly develop minerals value chain, including for EV batteries as reflected in the MoU between Zambia and the DRC, secondly enhance cross border linkages through the development of regional agricultural value chains and this becomes an anchor

[12] Refining is extremely energy-intensive and a polluting activity (The Big Switch podcast 2024).

[13] The Enforcement Regulation aims to resolve trade disputes in the absence of a functioning appellate body of the World Trade Organisation (WTO). However, its extensive reach could lead to tensions. While this instrument temporarily shields EU industries from shocks due to export restrictions such as those in Indonesia, mineral-producing nations, who seek greater policy space to add value to their minerals using similar tools as Indonesia, might view it as an intrusion on their resource sovereignty and oppose cooperation with the EU.

for growth and development, and thirdly provide a basis for a regional energy value chain to address the region's chronic deficit (UNECA 2024).

At the time of writing, EUDs in all three corridor countries were involved in discussing support measures for both hard infrastructure and soft infrastructure in line with the EU's 360° approach, including support and financing for energy and agriculture projects. A recent delegation led by the US President Biden saw business interests from diverse sectors including transportation and logistics, agriculture, clean energy and associated supply chains, health, and digital access (Pecquet 2024). Though US support for these projects remains uncertain, they form a part of broadening attention beyond minerals.[14] These additional initiatives may therefore add to the demand side for the corridor in more general terms, but as is discussed below, the current setup does not immediately lend itself to linking minerals and wider development around the rail corridor.

3.2. EU-external considerations

From corridor agreements to investments

Although the MoU, agreements and financial commitments around the Lobito Corridor have captured much media attention, their details and the implementation mechanisms remain unclear. The exact figures on commitments and actual investments are patchy, as are the specifics of what roles different partners will play.

Beyond the LAR consortium agreement cited above, the different construction and upgrading projects on and around the brownfield Lobito Corridor are expected to cost up to $2.3b (Hill 2024a). Around $1b of this had reportedly been mobilised as of June 2024. Investment announcements by G7 partners and regional development banks have exceeded $6b, of which over $4b from the US (The White House 2024). These commitments predate the US elections of 2024, but US support to the Lobito Corridor is assumed to continue under the new Trump administration (Chilamphuma 2025). While impressive, the precise project or how said amounts will be allocated is hard to ascertain.

The European Commission is analysing investment gaps and systemic issues along the corridor. This exercise aims to consolidate a joint vision for the Lobito Corridor that goes beyond minerals to include the 'economic corridor' and development ambitions cited in the seven-party MoU. The 360° approach

[14] "This includes support for Angola's ministry of transportation and support for agricultural producers along the rail corridor linking Congolese and Zambian mines to Angola's Atlantic coast" (Pecquet 2025).

therefore tries to marry the EU's economic security objective with partner countries' economic development priorities, enhancing partner competitiveness through entrepreneurship and innovation and addressing economic enablers and skills. The Commission is employing a 'Team Europe' approach to deliver on its ambitions, with EU Member States contributing to various sectors, including core rail investment (Italy), energy (Germany), agriculture logistics (Netherlands), CRM governance (Sweden and the Czech Republic), and TVET (France). Additionally, the private sector is being engaged through platforms like the Europe Africa Business Forum at the European level, while EUDs are considering how their current programming can be adapted in addition to the array of ongoing commitments that can be linked to the corridor.[15] Even so, it is difficult to gather an overall figure in terms of investment commitments.

Beyond the challenge of reconciling financial data, there is a lack of information on specific actions or how these will be coordinated with the partner countries. This adds to a perception among many that the Lobito Corridor initiative is externally driven, with few linkages to the political and economic reality on the ground. Despite the availability of multiple EU support instruments and commitments (e.g. financing, technical assistance, and other accompanying measures), to date there are few concrete proposals on how the EU will engage to ensure these linkages. Even if the approach arguably seeks to address the challenge of identifying bankable projects and attracting private investors that underpin much of the current African infrastructure gap (Pleeck and Gavas 2023), it remains an issue.

There is some degree of coordination among external partners. The US embassy has informally taken on a coordinating role in Zambia, chairing meetings on the Minerals Security Partnership along with the EUD (interview). Similarly, in the DRC, the EUD closely coordinates with the US embassy as it engages in dialogues with the government on where/how to support the Lobito Corridor and further the CRM partnership with the country (interview). On the other hand, formal coordination mechanisms among corridor countries such as the LCTTFA appear to be focused on trade facilitation and regulatory harmonisation issues, rather than the international partners and their investments. This raises questions about the alignment of the different interests and institutional structures being put in place to maximise shared benefits. Since 2023 there is now also a Lobito Corridor Investment Promotion Authority, a privately owned initiative (by US-based media

[15] Together these amount to several hundred millions of Euros and include some aspects of hard infrastructure (for example, railway interconnectors and support) but mostly focus on soft infrastructure (for example, trade and investment promotion, corridor development and trade facilitation, TVET, entrepreneurship, civil society engagement, mining governance, ecotourism and nature conservation, among other things).

firm Lerna Group Llc) that seeks to offer a multi stakeholder platform to coordinate public and private efforts around the corridor though its formal links to the corridor country governments and the LCTTFA are unclear.[16]

Though not uniform across corridor countries, there are some coordination structures to focus on the initiative within countries too. In Zambia, the Ministry of Commerce, Trade and Industry with the Ministry of Transport and Logistics have set up Project Implementation Units focused on the Lobito Corridor. In addition, the Zambian Ministry of Small and Medium Enterprise Development is currently providing capacity building support for Small and Medium Enterprises as preparation for their effective engagement in the Lobito Corridor. But as discussed below, how these work in other corridor countries is subject to wider political dynamics and priorities.

Dialogue with the DRC government regarding support for hard and soft infrastructure has just recently begun, and exploration of opportunities in energy and agriculture are at an early stage (interview). The EU has held business fora in Zambia to encourage investment, particularly in the copper mining sector, but links to the Lobito Corridor remain tenuous due to the early stage of discussions.[17] In January 2025, the Angolan president met with EU counterparts where a €76.5 million assistance package was announced, aimed at delivering "tangible benefits for the Angolan people through better jobs, enhanced education, and sustainable economic growth as well as to further develop the Lobito Corridor" (EC 2025b). A pipeline of projects focusing on the agro-energy-transport nexus, along with training, is being prepared by the EU under Business Europe. This aims to balance investment interests with development objectives while managing associated risks, with many of these projects based in Angola.

Even as a vision begins to emerge of the Lobito Corridor beyond mining, a diagnostic report prepared for the European Commission highlights that the LAR will not provide freight and passenger services. Similarly, on the Congolese side, Trafigura, which is pre-financing the rehabilitation of a stretch in the Dilolo-Kolwezi section, is focusing on mineral exports and mining inputs imports rather than freight transport (interview).

All of this further reinforces the uncertainty about the extent to which there is or will be demand for the railway and indeed whether available infrastructure matches the ambitions of going beyond minerals.

[16] https://www.lobitocorridor.org/about
[17] https://international-partnerships.ec.europa.eu/eu-business-fora/eu-zambia-business-forum-2024-04-10_en

From transport corridor to CRM agreements

Beyond the Lobito Corridor initiative itself, the CRM partnerships with Zambia and the DRC ideally complement the infrastructure and wider business development plans. Some argue that without processing investments, the Lobito Corridor's viability is questionable (King 2024; Geraud-Neema 2024a). Despite that, the status of the CRM Partnership country roadmaps, expected by mid-2024, remains uncertain (Geraud-Neema 2024b). Zambia's roadmap is reportedly agreed but not public, but consists of strategic pillars tailored to advance the EU's interests in the mining value chain, raising concerns among some interviewees about government ownership since it is clearly driven by the EU. The signing of the DRC's CRM partnership agreement was delayed pending the installation of a new government in May 2024 (Di Ciommo et al. 2024). The roadmap is reported to have been negotiated, though like Zambia, it is not public other than a public announcement made by the Ministry of Mines on social media.[18] Cited commitments include EU support to the centre of excellence for advanced battery research in Lubumbashi to create the right technical skills for the battery and electric vehicle value chain.

Beyond these, EU support for the DRC-Zambia MoU to jointly develop the EV battery value chain also remains uncertain owing to lack of coordination on the African side (further discussed below). While Brussels deems these partnerships strategic, the EU's concrete support and value added are also reportedly unclear at EUD level, suggesting a need for better vertical (between Brussels and EUDs) and horizontal (between the different DGs in Brussels) coordination to steer these partnerships. In the DRC specifically, there are also frustrations with the EU given its recent MoU with Rwanda as well as the security concerns (see below).

Importantly, the DRC and Zambia's CRM partnerships with the EU are not exclusive. Both countries have signed agreements with other countries motivated by supply chain concerns amid geopolitical fragmentation (Beuter et al. 2024). DRC has similar agreements with the US (2022), Japan (2023) and Saudi Arabia (2024) while Zambia has agreements with China dating back as far as 2010, but also India (2019), US (2022), UAE (2023), Japan (2023), the UK (2023), and most recently Saudi Arabia (2025, Kamanga 2025).[19] As such, the different partnership agreements about and around the Lobito Corridor are only some among many different interests playing out, reflecting a reality that much will depend on domestic and between-country interests of the corridor countries.

[18] See https://x.com/minminesrdc/status/1867174641833226751?s=46&t=XRkBI6NrI8Ob7nSedwiw2Q&mx=2

[19] See https://afripoli.org/projects/crm-mapping/ for more.

Finally, while the Lobito Corridor has attained a geopolitical character because of supposed competition with China for access to minerals, the significant intermingling of Chinese and EU investments makes separation difficult. By 2019 China had funded one in every five infrastructure projects in Africa (four times more than the EU) and constructed one in every three (Karkare et al. 2020). China extended a loan and executed the upgrading of the Benguela railway in 2006 and Lobito port in 2014 (Schipani 2024) (while the TAZARA, to which the Lobito Corridor ultimately aims to join, was also built with Chinese cooperation back in 1975).[20] A consortium partner of the LAR, Mota-Engil, has Chinese shareholding with the locomotives for the railway produced in China (Africa Confidential 2024)[21] (while engines are made by US-based General Electric). In practice, therefore Western and Chinese firms significantly interact, making it difficult to segregate supply chains (China Global South podcast 2024a).[22] Additionally, with China being the primary consumer for corridor-mined CRMs, the CRM-investment landscape is similarly characterised by connected investments. From this perspective at least, arguably, China is doing what is deemed necessary for their economic development, irrespective of the interventions by the EU or the West more broadly.

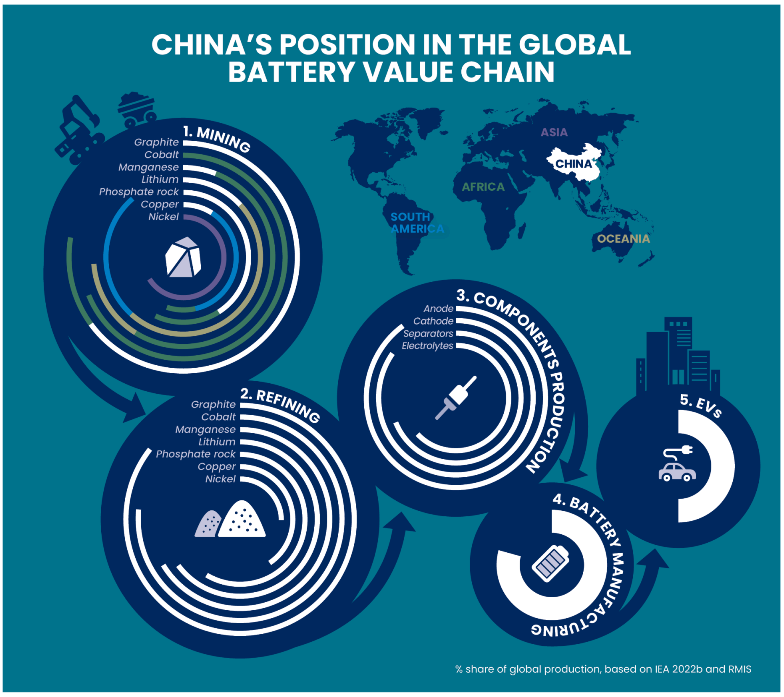
CRM-related investments

A key challenge in linking the above-mentioned hard and soft infrastructure investments to the CRM agenda relates to the level of EU-US financing for CRM-related acquisitions. Current European investment in CRMs is limited (Faubert et al. 2024)[23] when compared to China's overall $57bn in aid and loans for transition minerals in 2000-2021 (Escobar et al. 2025). Chinese companies control at least 41% of DRC cobalt production and 28% of copper in the DRC and Zambia (Andreoni and Avenyo 2023).[24] Major copper producers in Zambia (First Quantum Minerals Ltd.) and DRC (Ivanhoe Mines Ltd.) have Chinese ownership and export primarily to China (Rajkotwalla 2024). This also raises questions about the degree to which the Lobito Corridor will truly help 'compete' with China rather than simply connecting to existing Chinese investments.[25]

[20] For a map on China's significant interests in African ports see Nantulya (2025).
[21] The company reportedly had to create an ad-hoc structure to isolate its Chinese ownership in the operations of the corridor (interview).
[22] Copper shipped through the corridor is reportedly sold to US clients by Chinese firms operating in the corridor.
[23] Production-weighted holding rates in EU listed companies is in the single digits for rare earths (0%), nickel (4%), lithium (2%), copper (7%) and cobalt (4%).
[24] While these numbers are significant, it is important to note that nearly two thirds of Africa's total mining production is in fact controlled by two Western multinationals: Glencore (Switzerland) and Anglo American (South Africa) (Ericsson et al. 2020).
[25] From the perspective of the rail operator, the commercial viability of the railway hinges on the volumes passing through, without the LAR necessarily being concerned with the destination nor ownership (i.e. whether it is Western or Chinese) of the goods being transported.

In the absence of significant complementary investments in processing these minerals, and given China's dominance in CRM refining (see e.g. Ritchie and Rosado 2024) and downstream sectors such as EV batteries (Figure 3), Lobito Corridor investments may simply benefit Chinese firms by offering a more efficient export route by avoiding the cumbersome truck route to Dar es Salaam (Sanderson 2024; Gerding 2024). While the EU seeks to increase refining capacity in Europe, as identified in the CRM Act of 2024, it faces its own set of challenges.[26] The DRC refines most copper outside of China (alongside Chile) showing that the DRC has the potential to supply refined minerals, specifically copper, and complement the EU's supply chain security objectives but at the same time, local African contractors, including in Zambia, struggle to access funding for mining and processing projects, hindering local content development (interview).

Figure 3: China's dominant position in CRM refining and downstream activities



Source: Karkare and Medinilla 2023

The EU's CRM partnership approach contrasts with China's state-to-state model and turnkey projects,[27] which are attractive to African leaders due to quick,

[26] While explaining these challenges is beyond the scope of this paper, these include energy and environmental risks given that refining is a polluting activity. Experts point out that the EU's own supply chain security agenda cannot be achieved through domestic processing alone needing it to work with partners (Le Mouel and Poitiers 2023). Yet others argue, "China did not become the world's factory by controlling critical minerals; rather, it developed critical mineral supply chains in order to feed its factories" (Clarke 2024), highlighting the need to address demand-side factors for successful European investments.

[27] Typically, Chinese projects involve CRM extraction with an aspect of infrastructure (road development) or energy (to facilitate CRM extraction).

tangible results (Karkare 2024).[28] The EU's Global Gateway aims for a holistic approach, addressing shortcomings where development aid is not tied to EU businesses or EU strategic goals. But the scale of investments has been limited at best and speed at which projects are delivered is slower than China (ZhōngHuá Mundus 2024). The EU struggles to attract European private investment in African mining due to risk aversion and human rights concerns, and the economic incentives for European firms to work in these jurisdictions are limited (Logan 2024; García-Herrero 2024). In the DRC in particular, perceived risks linked to corruption, lack of contract enforcement, exchange rate shocks, and insecurity among other things undermine the willingness of investors to engage (IFC 2022). Even EU development finance institutions, including the European Investment Bank (EIB), have shown limited interest in investing due to these factors.[29]

Nonetheless, investments by Western firms are on the rise, after sales of mines held by Western firms to Chinese-owned firms.[30] These include the above-mentioned KoBold Metals, the potential anchor investor for the Zambia-Lobito railway project. The firm is driving discovery through artificial intelligence and is developing Zambia's biggest copper (Mingomba) mine (Government of Zambia 2024).[31] Kobaloni, which is developing Africa's first cobalt sulphate refinery, is also seen as strategic as the EU and the US seek to challenge China's dominance in refining of CRMs. Ivanhoe is also reported to have won an exploration license in Zambia.[32]

But the short-term profit needs of private firm operations complicate investment efforts, especially during times of low prices or supply glut (IEA 2024; China Global South podcast 2023).[33] The volatility of CRM prices can also result in a dilemma - whereas high CRM prices may attract investments, they may slow the green transition, while low prices affect the competitiveness of these firms and therefore the long term supply security (Patrahau and Rademaker 2024).

[28] Overall, according to the Chinese Ministry of Commerce, Chinese firms have signed contracts worth as much as $700 billion in Africa between 2013 and 2023 (VoA 2024).

[29] While the EIB has been closely involved in the EUD (Kinshasa) and Brussels negotiations with the DRC government, its total investment portfolio in the DRC, as projects are being identified, could more than double compared to its portfolio since the 1960s. This poses challenges given the risk profile of the country (interview).

[30] The US lost its last major foothold in the copperbelt when the firm Freeport McMoRan sold its mine to a Chinese competitor in 2020 (Hill 2024a). A similar situation is unfolding in the DRC where the mining firm Chemaf, a long standing partner of Trafigura, is selling its assets due to low prices. But in this case, state-owned Gécamines, supported by US lobbying, is trying to avoid them falling into Chinese hands (Njini 2025).

[31] The firm has also expressed interest in exploring lithium deposits in the DRC (Kavanaugh and Clowes 2025).

[32] https://bit.ly/4i6GAVh.

[33] https://bit.ly/4jGF4dR.

The EU 'norms and values' agenda

Beyond issues of transport, minerals access and processing, actors in the region show concerns about the impact of these investments. Weak legal frameworks at the national level can mean limited oversight to ensure social sustainability, mitigate environmental footprints and improve mining governance. The recent collapse of a waste storage dam at a Chinese-run operation in Zambia discharged toxic waste containing toxic sludge from copper mining into a nearby river, and risks further contamination of the Zambezi, a major river in the wider Southern Africa region (Manda 2025). It is argued by some that lower environmental oversight and labour costs (alongside market-distorting state-backed and subsidised financing) make Chinese projects cheaper than European firms who are obliged to observe higher ESG standards, in turn making them less competitive on a cost-basis (though there are nuances that can be added, see e.g. China Global South podcast 2025a).

Mineral supply chain due diligence has been encouraged to ensure respect of human rights, avoid contribution to conflict, and support broader development. The prism of conflict minerals has given rise to increasing unilateral requirements on due diligence, sharply contrasting the Chinese approach where projects are implemented with greater speed (de Brier and Hoex 2023). The primary focus of these regulations is those purchasing the minerals rather than the concerns of people relying on mining operations as a means of living, leading to some frustrations because they raise costs and administrative barriers for the very actors these regulations aim to support i.e. miners (Haagh 2024). This highlights yet another difference between the broader Chinese and European approaches – whereas the Chinese regard Africa as a land of opportunities with high-level political attention to African leaders, the European approach has been one of mitigating risks by working with civil society.

While aiming to highlight the plight of miners, Western NGO and media coverage has inadvertently led some companies to avoid sourcing from the DRC altogether due to reputational risk (Sanderson 2022).[34] Additionally, 'de-risking' efforts could result in virtue signalling rather than tangible improvements, especially for artisanal miners (Gouby 2024).[35] Similarly, the conflict-minerals link is being challenged through robust research (IPIS 2024). Indeed, even where there is a link it is unclear how the EU approach helps – the resolution of the ongoing conflict in

[34] According to Dempsey (2023), "The $7.7tn club of miners, car manufacturers and electronics makers – including Glencore, Volkswagen, Microsoft and Apple – who belong to the Responsible Minerals Initiative continue to rigidly exclude artisanally mined cobalt from what they consider "responsible" sources".

[35] Arian and Bushiru (2025) capture multitude aspects around cobalt mining in the DRC, where responsible sourcing is but one challenge that holds back the development in the sector.

eastern DRC requires long-term political solutions, which goes beyond the scope of current EU CRM or Lobito Corridor engagements (Geraud-Neema 2024a).

Even as the EU's focus remains on improving African governance, Western firms have also been involved in corruption scandals. Trafigura itself has been involved in one such high profile case.[36] Additionally, Western aid and multinational supply chains inadvertently finance conflict by paying access fees and taxes to rebel groups at roadblocks they control (Schouten 2021), a hitherto overlooked link. More broadly, this technocratic and decontextualised approach has led to perceptions of hypocrisy (Gouby 2024) where Western governments consider themselves superior, with unrealistic initiatives that fail to incentivise responsible mining (de Brier and Hoex 2023; Lezak 2024).

Other governance issues in the mining sector, including corruption and human rights violations, raise questions about the EU's ability to de-risk the sector (from China) for European companies while maintaining responsible practices. Additionally, incidents like the alleged firing of a US DFC employee over displacement concerns (Anyanzwa 2024) also highlight potential conflict of interest among Western partners where realpolitik is prioritised over sustainability in the effort to 'derisk' supply chains (Müller et al. 2023).

To summarise, the EU's geopolitical imperatives combined with its limited financial muscle and technocratic approach, is perceived as paternalistic by African counterparts, feeding into historical relations (Eickhoff and Tull 2024; Martin 2024), with implications for the Lobito Corridor's success. As the EU seeks to invest and engage in this corridor, there are systemic questions about the *beneficiaries* - European or partner country private sector - the real *objectives* - SDGs or export promotion or building infrastructure - and the *instruments* - development cooperation or strategic investments which may be steered by other DGs rather than DG INTPA to achieve stated ambitions. While retaining a 'values agenda', there is a need to understand China's strategy to adapt the EU approach and effectively compete (Escobar et al. 2025). But above all, African partner countries also have intricate political, economic, and social landscapes which affect the success of the corridor. These will now be discussed.

[36] In addition to paying a fine and restitution, in an unprecedented move, Trafigura's former COO has been sentenced for the case in Angola where a senior Angolan official in Sonangol was paid $5 million in bribes for contracts that won Trafigura $147 million in profits (Farchy and Hunter 2023; The Continent 2025).

3.3. Considerations from corridor countries

While the above discussions start from the perspective of external partners, there is clearly a need to understand the interests and what is driving political engagement from the corridor countries themselves. These can be further distinguished into their relations with the West and China, and the relations between and within the corridor countries, which together will impact their outlook on the Lobito Corridor.

Relations with the West and China

For all three countries, the Lobito Corridor is an addition, rather than alternative, to existing trade and transport routes. Much like their stance of seeking closer ties with both sides of the emerging West and China geopolitical divide, the Lobito Corridor is seen as one of many interesting and potentially useful initiatives. The previous Heads of State in all three countries - Presidents Joseph Kabila in the DRC, Edgar Lungu in Zambia and José Eduardo dos Santos in Angola - had close relations with China, with their successors seeking to rebalance relations with the West. This reflects a pragmatic approach, but also past history with Cold War proxy wars affecting the region, leading leaders to avoid aligning with specific geopolitical blocs (CFR 2023).

For the DRC, relations with the West have been fraught, compounded by domestic shortcomings (Doss 2023). In particular, relations with the EU have been strained (see box 4). There has been a rapprochement with the US under the President Felix Tshsekedi which is partly reflected in the renegotiations of Chinese mining contracts (ECDPM 2024). Nevertheless, Chinese presence remains significant and in January 2024, “China pledged up to $7bn in infrastructure investment in a revision of the Sicomines copper and cobalt joint venture agreement with Kinshasa” (Schipani 2024).

Box 4: Socio-political environment in the DRC

DRC has experienced rapid but fragile economic growth driven by minerals which coincides with violent conflict, including continual flares and mass displacement. Years of bad governance, state absence, corruption, and the lingering effects of colonial history and proxy wars have exacerbated these challenges. The rebel group M23, supported by Rwanda, has seized major cities in North and South Kivu.

Ineffective peace processes by the UN, flawed human rights and humanitarian approaches by Western development partners, and continued meddling by neighboring countries (responsible for two regional wars) have fueled significant frustrations. Regional missions by the EAC and SADC have failed to bring peace in the latest violent surge, suggesting a need for dialogue over military confrontation (Karkare 2025). However, President Tshisekedi is reportedly considering a minerals-for-security deal with the US as Kinshasa loses ground to M23.

The latest round of tensions with the EU relates to its CRM partnership with Rwanda (EC 2024c) . In addition, the EU also announced €900 million worth of investments in Rwanda through the Global Gateway and more controversially awarded two grants worth $43 million to the Rwandan army for its operations in Mozambique (Stearns 2025). These deals, in the midst of allegations of the Rwandan presence in eastern Congo to fuel the M23 rebellion and their plundering of minerals, has led the Congolese authorities to accuse the EU of complicity in Rwandan aggression in eastern DRC (Titeca 2024; Châtelot 2024).

A meeting with the EU special representative to the Great Lakes did not occur, allegedly over discontent regarding the EU deal with Rwanda (Nsimba 2024). Paradoxically, as Titeca (2024) points out, these developments are unlikely to mean a total breakdown in relations as it serves the interests in Kinshasa - by blaming the conflict in the east on Western support of Rwanda, the government can effectively deflect attention from its own weaknesses in handling the situation. The EU has since introduced sanctions on some leaders of the M23 and the Rwanda Defense Force, with the CRM deal placed under review (Cokelaere and Gijs 2025).

The Lobito Corridor provides the DRC with an additional option to transport its minerals to the coast for exports, with only one border crossing as opposed to the Durban (South Africa) or Beira (Mozambique) routes. There is, however, a sense that the DRC is circumvented when it comes to private investments given its difficult business environment despite the fact that most tonnage transported on the brownfield railway line in fact comes from the DRC. While the greenfield Lobito-Zambia railway (phase 2 of the project) essentially means bypassing the DRC, relevant players are well aware that there are strong linkages and road transport connections between Kolwezi (DRC) and Solwezi (Zambia) which will continue to compete with the railway connection.

In Zambia, the Hilechima administration has resurrected previously poor relations with the West (Vandome 2023). Despite difficult debt negotiations, which internationally has been blamed on China, Zambia has sought to strengthen relations with this country focusing on growth. A recent visit to China saw investment commitments on new solar and wind energy projects and battery manufacturing, in line with the stated ambitions and priorities of the government (Chen 2023). The EU's Global Gateway in Zambia includes three programmes worth €110 million, including €30 million for the rehabilitation of the Kariba Dam (EC 2023d), though not greenfield projects which are typically complex, arduous, multi-year efforts. The country is seen as a test case for democratic governance and potential ally of the West, for the functioning of the G20 Common Framework for Debt Treatments, not to mention its CRM endowments (Vandome 2023). These overlapping interests and considerations also show the complexity of African agency (Kamwengo 2024).

In Zambia, the Lobito-Zambia railway ambition dates back to the time of the first President Kenneth Kaunda (Devermont 2024).[37] While the current geopolitical interest in the railway line neatly coincides with existing ambitions to spur economic activity, there are also concerns about competition from Latin American imports into the country (interviews).

Angola's relations with both the West and China have been strong. Whereas its bloody civil war is among the prominent symbols of the death and destruction left by the Cold War, relations with the US have since been cordial, with a particular boost in recent years. The Angolan President João Lorenzo is the only African Head of State, apart from Kenya's William Ruto, to have been received at the White House to discuss economic and other cooperation. President Biden's visit in December 2024 makes Angola the first country to receive a US Head of State since 2015 (Dizolele 2024) while receiving much attention from the EU as highlighted above (see section 3.2). At the same time, Angola has also been a long-standing signatory of China's BRI.[38] As Angola's debt-fuelled, yet jobless, development showed the limitations of resources for infrastructure-alike deals, the nature of relations between these two partners has changed with a reconfiguration on both sides due to various factors (Jura et al. 2024). Nevertheless, President Lorenço also won concessions during a recent visit to China with its debt stock reducing from $45 billion to $17 billion through restructuring, unlike Zambia, leading some observers to call Angola the 'Vietnam of Africa' (China Global South podcast 2024b).

[37] Even as negotiations with China over TAZARA were initiated, Kaunda 'quietly' backed a proposal to build a new rail link connecting Zambia's copperbelt with the port of Lobito in an effort to keep as many alternative routes to the sea as possible.

[38] According to the Chinese Embassy in Angola, "Chinese companies have contributed to the restoration or construction of 2,800km of railways, 20,000km of roads, over 100,000 housing units, more than 100 schools and over 50 hospitals in Angola, and more than 400 Chinese companies have a presence in Angola" (CGTN 2024).

When looking at the Lobito Corridor specifically, the award of the railway concession to the LAR consortium can be seen as a culmination of efforts documented as far back as 2015, with Angolan authorities firmly in charge of the process throughout.[39] The consortium is said to have presented the best technical proposal through a 'thorough, open and competitive' bidding process (Olander 2022; Hill 2024a). All this shows Angola's agency rather than any action by the West to lure Angola into either side of the West-China rivalry.

In summary, the EU is an important partner for Lobito Corridor countries, but is only one among many. Governments show reluctance to pick sides politically, while economically the investments and businesses from the West and China are highly intertwined.

Relations *between* corridor countries

Of course, for the Lobito Corridor to succeed will also require interests to align *between* corridor countries. Here, relations are cordial. Under the leadership of the current President Lourenço, Angola has played an important role in mediating a peace agreement in the DRC under the Luanda Process (2022), holding bilateral meetings between President Tshisekedi and President Kagame to diffuse tensions, arriving at a ceasefire deal signed in August 2024.[40] Its success, however, was short-lived as the negotiations have been stalled since December 2024, further compounded by the recent escalation in violence in eastern DRC (Amani Africa 2025; Stearns 2025). With renewed efforts, a meeting was organised to negotiate peace between President Tshisekedi and the M23 facilitated by President Lorenço, though the M23 withdrew following EU sanctions, finally resulting in Angolan President's office announcing an end to its mediation role to focus on the President's new role as the Chair of the African Union (AfricaNews 2025).[41]

Similarly, there is a commitment to strengthen economic ties between Angola and the DRC (Diplo News 2023; Short 2023). Nevertheless, Angolan

[39] Duarte et al. (2015) reports that as part of the institutional reforms in its harbour and railway sectors, there was an emphasis on private sector involvement, through partnerships with politically connected Angolan companies. Trafigura, in collaboration with the Angolan company Cochan, established the DT Group to manage investments in mining, infrastructure, and agriculture. The DT Group, linked to Belgian company Vecturis, played a significant role in rehabilitating the Katanga railway, seeking to expand operations along the Benguela railway and Lobito harbour. Carbó and Abebe (2024) further detail how the LAR consortium partners entered the corridor through business dealings with political elites for their personal enrichment.

[40] This was in parallel to the Nairobi Process seeking a resolution between the Government of the DRC and the numerous armed groups in the east of the country. For more details, see (Byiers et al. 2023). After the joint EAC-SADC meeting, the two processes have been merged (Karkare 2025).

[41] While a ceasefire was announced through mediation by Qatar, this led to some frustrations in Luanda, while the M23 has defied it (Dudouet 2025).

political-business elites are said to regard the DRC with some concern due to the business environment, though there is a realisation of the vast business opportunities in the mining sector (interview). The case is similar in Zambia. While the political ambition for the greenfield railway line is to reduce Zambian dependence on the DRC (Zambian Parliament 2023), from a Congolese perspective, political elites are closely connected to the road transport sector on which the mining businesses depend. Given the money to be made from mineral transport, there is arguably also jostling on the DRC side to ensure that the road transport, where political elites are often owners of businesses, continues to thrive (ICG 2016).[42] For instance, Moïse Katumbi, a former Governor of Katanga, has interests in several trucking firms such as Hakuna Matata, Muzuri Sana and Habari Kani, carrying Congolese copper (Ibid.). Indeed, according to many observers, the main problem for the operationalisation of the Lobito Corridor remains on the DRC side (Gerding 2024; Schipani 2024).

Trade patterns among Angola, DRC, and Zambia show that formal trade is currently limited, though informal trade is substantial.[43] According to available data, whereas Angola is less integrated regionally, with less than 3% of its exports and less than 10% of its imports involving other African countries, trade relations between the DRC and Zambia are more intense, driven primarily by the DRC-Zambia copper trade and related mining inputs, and Zambia's export of food and beverages to the DRC. Without diversification in the export basket and intensification of regional trade links, the Lobito Corridor risks serving mainly to transport unprocessed minerals from the West Coast of Africa, instead of the Eastern or the Southern Coast.

Boosting cross-border trade will require further efforts on trade facilitation and harmonisation of policies across borders (ECFR 2025). Both Zambia and Angola have had contested borders with the DRC if not outright border disputes (e.g. Mucari 2020; Edmund et al. 2019). While these tensions do not seem to affect current relations, there are issues around cross-border coordination. For instance, even though the railway gauge in the DRC and Angola are the same, axle loads differ – while in Angola it is 22 tons, in the DRC it is 16.5 tons, allowing for fewer wagons and lower speed on the railway line on the Congolese side compared to the Angolan side. Moreover, insecurity has led to disruptions including border closures between the DRC and Zambia (China Daily 2024). In fact, insecurity in the DRC is one of the key reasons for the interest in the Zambia-Lobito railway line,

[42] While the political and business priority has been the development of infrastructure linking the mining areas in and around Kolwezi more directly to export routes, including the refurbishment of the railway connecting to the Benguela line, there are reports of business elites in Kolwesi and Lubumbashi backing rival road corridors.
[43] Agriculture and livestock trade between the DRC and Zambia is high, with Lubumbashi informally regarded as the 'eleventh province' of Zambia (interview).

where currently there are strict contract conditions in Zambia to travel in convoys, during the day and sometimes also with armed security personnel.

At a more practical level, non-tariff barriers to trade remain between customs systems. Customs harmonisation between the three countries has struggled given different languages, IT systems and the level of infrastructure at respective borders. Border management was identified as a challenge in a recent diagnostic report, disproportionately affecting women who are mostly engaged in informal cross-border trading (World Bank 2024). Currently, the Zambian government along with the AfDB are implementing the Lobito Corridor Trade Facilitation Project which looks at training for SMEs and the development of a business platform. However, it is unclear whether there are similar projects in the other two countries and whether there is coordination among them.

The Lobito Corridor also faces competition from other ports in the region. Walvis Bay Port in Namibia offers an interesting case of potential cooperation and competition. Although Walvis Bay port is equipped with a container terminal, it lacks the cargo volumes (Freightnews 2023), meaning the Lobito port could potentially increase competition for cargo. However, inefficiencies on the Lobito rail line (e.g. derailment, but also corruption or delays at the border), and at Lobito port (e.g. lack of equipment) may become an advantage of competitors with shippers willing to pay a premium for secure passage through Walvis Bay. On the other hand, firms like Zambia's First Quantum Limited see the Lobito Corridor as complementing their strategic shift towards Walvis Bay, away from Durban due to insecurity (interview). The complementarity, rather than competition, comes from the fact that the road corridor to Walvis Bay connects only the Northern Province while the Lobito rail corridor also connects the Copperbelt province, and that Walvis Bay is a smaller port compared to Lobito.

Lessons might also be drawn from the existing TAZARA line. Rivalries between Tanzania and Zambia in jointly managing this line shows the complex relations among African partners which have contributed to the previous failure of cross-border management of railways to reach full potential (China Global South podcast 2024c). This includes the lack of ownership by African partners and instead handing over responsibilities to external partners, as well as more practical issues around agreement on revenue-sharing, and sharing responsibility of managing and maintaining the railway. There is a likelihood that this history repeats itself in the case of the Lobito rail line, unless there is sufficient coordination among the three countries.

Countries often compete rather than cooperate when it comes to regional integration, aiming to maximise domestic profit and value addition. The case of battery production is telling, where there are current disagreements between Zambia and the DRC over the location of a previously agreed battery precursor plant (Olan'g and Scurfield 2023). The lack of viability of a single cross-border Special Economic Zone (SEZ) necessitated separate SEZs and respective battery councils in DRC and Zambia, though with unclear coordination between the two with unrealistic expectations, as shown by the initial goal to source all battery precursor minerals domestically.[44] Similarly, border closures and import tariffs further hinder collaboration, despite potential mutual benefits (see e.g. Karkare and Medinilla 2023).[45]

In summary, while political relations between the corridor counties are 'cordial' on the surface, there are no current strong ties or proactive business links driving a need for closer integration through the Lobito Corridor. That then points at limited existing private sector demand for services that the Lobito Corridor might offer, while to trigger these may require a broader scope beyond minerals.

Challenges *within* corridor countries

Politically, priorities shift with electoral cycles and new administrations can put ongoing initiatives on hold. This is a risk for large projects such as the Lobito Corridor, requiring coordination across countries over several years (China Global South podcast 2025b). For example, in the DRC there is a competing interest to develop a deep sea port at Banana, where the government secured funding from investors as recently as August 2024 (Orucho 2024).[46]

Economically, apart from commodity dependence and associated problems,[47] a series of binding constraints linked to infrastructure, affordable electricity, and financing hold back development in other sectors, including the possibility of

[44] The battery precursor plant that was initially envisaged to produce around 100,000 tonnes of NMC precursors a year, requiring around 48,000 tonnes of nickel, 15,000 tonnes of manganese and 16,000 tonnes of cobalt that has been refined into sulfate.

[45] In 2020, a Zambian firm had to suspend its cobalt processing operations due to a cobalt feedstock shortage following a 5% tariff imposed by the Zambian government on imports from the DRC. While the tariff has been lifted since, this case highlights the tensions between regional cooperation and competition as countries aim to retain profits and add value within their national boundaries.

[46] The agreement goes back to the time of the previous President Joseph Kabila, though there has been revival of interest. To improve access to Kinshasa, there is also an alternative or competing vision which is the road project linking Kinshasa to the port of Pointe Noire via Brazzaville in the Republic of Congo (IFC 2022). Similarly, the SNCC has ambitions to develop railways beyond the Dilolo-Kolwezi stretch, to expand East to West as well as from North to the Centre and East of the country.

[47] For instance, the government of the DRC recently announced a suspension of cobalt exports due to low international prices though it is unlikely to be effective (Lucas 2025).

upgrading from mining into processing. These longstanding challenges contribute to the above questions about the commercial viability of the Lobito Corridor beyond CRMs (apart from the fact that there is little interest by the LAR to engage in freight and passenger transport, see section 3.2.).

More broadly, weakness in state capacity is a common feature across many African states, undermining the ability to maintain peace, promote growth and deliver services. This affects state-society relations, leading at times to political elites extracting value but steering it towards unproductive personal enrichment and political survival rather than negotiating deals that increase the economic pie before gobbling it up. Significant elite accumulation in all three countries has not led to genuine development. In the absence of such 'development bargains', a country's riches are traded for trinkets by international private firms as highlighted in the Trafigura case in Angola or Glencore in the DRC among others (The Continent 2025; Jolly 2022).

The lack of state capacity is also seen in terms of missed investment opportunities. CMOC, a leading Chinese mining company, has significant stakes in the DRC's copper/cobalt mines which happen to be among the most productive in the world. CATL, a major Chinese battery producer, was seeking to acquire stakes in the upstream copper and cobalt mining operations in line with the overall business strategy of vertical integration to secure supply of CRMs needed for battery production. At the same time, the DRC government was exploring options for ARISE-IIP, an infrastructure developer, to set up a SEZ under the originally envisaged EV battery MoU between the DRC and Zambia, and get CATL as a potential anchor investor in exchange for guaranteeing them access to copper/cobalt needed for their operations. In the meantime however, CATL signed a strategic partnership with CMOC to access the copper/cobalt needed for its battery production.[48] This move however has limited potential leverage for the DRC government to have CATL invest in an eventual SEZ.

This comes, among other things, from what Opalo (2025) calls the outsourcing of development priorities. "Instead of helping with questions of 'how to get things done', outsiders (consultants appointed by development partners) are often recruited into the driving seat and tasked with deciding 'what is to be done'.. [where African] states and civil society organisations are mere implementation arms of foreign governments and organisations", mimicking 'best practices'. Far from being neutral players, the latter's recommendations often reflect their own biases and gaps. The result is low development ambitions with a focus on 'palliative anti-poverty projects' rather than structural transformation. There is a

[48] See https://www.catl.com/en/news/644.html.

risk of this happening with the Lobito Corridor and CRM partnerships, unless African partners proactively drive the process.

Beyond external actors there are also sector characteristics to be considered. The EV battery-related investments, even if they materialise and overcome the challenges of regional cooperation as mentioned above, are unlikely to generate mass employment that the corridor countries need given that this is a highly capital-intensive sector (Karkare and Medinilla 2023). This is important because job creation remains the top policy priority that African citizens want their governments to address (Afrobarometer 2023). This in turn requires attention to be turned to other more labour-intensive sectors like agri-business which has the potential to create more jobs.

In Angola, agribusiness development is a policy priority to move away from oil, with a focus on livestock and localisation of other food value chains in an effort to address rising import-dependence (Freightnews 2024). The Lobito Corridor covers the 'triangulo do milho' (the corn triangle), with the government trying to attract investments (Duarte et al. 2015). It also runs along provinces with excellent conditions for fruit production namely citrus and avocado (RVO 2023), linking it to the EU's interests to finance projects including cold storage (Nogués 2024).

In summary, socioeconomic development and governance in these countries have a long way to go and need other support measures beyond what is currently offered by the development partners of the Lobito Corridor.

4. Implications

What do the above dynamics mean for the viability of the Lobito Corridor? From an EU perspective, the EU's toolbox to engage with partners is in constant evolution but arguably needs to expand in order to ensure broader benefits. According to Findeisen and Wernert (2023), enhancing the EU's economic resilience to reduce its vulnerabilities with regards to CRMs will include dealing with trade offs and a focus on three main changes: 1) marshal substantive European funding (including to support its own private sector) and administrative support provisions; 2) establish achievable diversification requirements for European companies through regulation, and 3) equip external trade and partnership strategies with meaningful resources. At the same time, as highlighted in the case of CRM investments, China is far ahead, while the corridor countries insist on greater processing before exporting their minerals.

Below we highlight seven key aspects with recommendations:

1. Despite the 'geostrategic' framing of the Lobito Corridor from the perspective of external partners, this is not matched by reality on the ground. The EU has a limited track record of engaging its private sector in the corridor countries, especially around CRMs, and Western firms often work with, rather than compete against, Chinese firms. Given that these supply chains are difficult to separate in practice, a narrative of **complementarity rather than competition** is needed.[49] This would also be in line with the EU's more pragmatic approach towards China, especially given recent tensions with the US.
2. While the EU's economic future depends on strong partnerships (Medinilla et al. 2025), it also means sufficiently responding to partner ambitions and priorities. The commercial viability, and political feasibility of the Lobito Corridor hinges on **investment in CRM processing in corridor countries**. The EU needs access to CRMs in Zambia-DRC but has little capacity to refine them in Europe, while corridor country governments seek ways to add value to their minerals. This provides a clear case for cooperation between the two partners for their respective geopolitical and development goals.
3. Beyond framing of issues, in practice, the EU should incentivise its private sector to operate in the three corridor countries, and include local firms in their supply chain as part of its approach to encourage investment through the Global Gateway. This implies working through **instruments beyond development cooperation and ensuring coherence and alignment** between corridor, CRMs, and wider investment instruments. This requires greater horizontal and vertical coordination between Brussels and EUDs and between the different DGs at the European Commission.
4. The **EU could also better leverage its expertise**. For instance, given its strength in norm-setting, especially ESG standards, the EU can turn it into a business strength by boosting the overall benefits of projects being implemented, whether in infrastructure, mining or other sectors. There is already some collaboration between European and Chinese firms around infrastructure (van Staden 2024). Not only does this make sense from the African vantage point of seeking cooperation with all partners, but it can also address some of the frustrations related to EU's technical support not reflecting in economic activity.

[49] The calculus from a US perspective is different in that it is perceived to be difficult to galvanise support for the Lobito Corridor simply on the merit of the wider benefits it would bring to the corridor countries and thus the US administration is deliberately adopting a narrative of 'countering China' to ensure continuity in US support to the initiative. It is unclear whether this consideration is relevant on the EU side however.

From the perspective of corridor country policymakers, the path with the least downside risks in the current geopolitical environment, and indeed most potential benefits, links to African regional integration. Yet, this ambition has not come to fruition because of political economy reasons, among others (Moore 2025). Corridor countries can leverage the geopolitical rhetoric around the Lobito Corridor to boost cross- order integration to develop RVCs. There are opportunities to bring African economic development priorities closer to the EU's, and other external partners', geostrategic interests. Apart from CRMs processing, DRC-Zambia aspirations to produce battery precursors require collaboration with foreign firms to acquire know-how which can be better negotiated in exchange for providing access to their CRMs. Given the imperative of mass job creation, value chains beyond CRMs should be further explored.

More specifically recommendations for corridor country policymakers include:

5. Given the interest of corridor countries, and Angola in particular, of developing RVCs beyond minerals, the agribusiness sector merits much greater attention. Investments and policy reforms would help to create urgently needed jobs around the corridor. This would help create demand to **adapt current plans to ensure that goods other than CRMs can be transported along the railway line through discussion with LAR partners**.
6. Corridor country governments must find ways to link the current trade facilitation institutional setup to wider investment promotion. Lessons can be drawn from other regional corridors such as the Northern corridor in East Africa not just in relation to logistics management and border controls but also to link transport to wider socio-economic development. This would help ensure a degree of **peer learning and information sharing to adopt coordinated policies on and around corridors to boost industrialisation and job creation**.
7. Corridor countries must find ways to **cooperate to ensure the best possible deal from the international partners**. Though each seeks its own national interests, by coordinating regionally the corridor countries will be better placed to integrate these interests into negotiations with external partners, rather than remaining the battleground where external geostrategic interests and competition plays out. An important consideration here should be on building stronger state capacity.

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