Securing Justice: A Blueprint for the UK's Critical Minerals Strategy

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Executive Summary

The UK's new Critical Minerals Strategy comes at a crucial moment, marked by surging demand for key minerals, escalating geopolitical tensions, and the ongoing fragmentation of the global economy. Its aim is clear: to secure access to the materials needed for AI technologies, advanced military equipment, and the energy transition.

Yet by prioritising access and security over justice, the Strategy reinforces a trade and financial architecture that locks mineral-rich countries in the Global South into cycles of extraction, poverty, and ecological harm. This threatens to leave behind the very countries and communities where minerals are concentrated, all while failing to address the interlocking crises of inequality, climate, and affordability at home.

A just approach to critical minerals must break with this logic. This means transforming international partnerships to guarantee economic sovereignty and shared benefits abroad, while reducing projected mineral demand through resource-efficient, public decarbonisation pathways at home.

True, long-term security comes from genuine partnerships and climate resilience – not from resource competition or militarisation. Justice must be viewed not as a costly concession, but as the prerequisite for a secure and sustainable future.

This briefing outlines the shift in perspective necessary to realise this vision and ends with a list of recommendations for UK policymakers.

Introduction

What are critical minerals?

Critical minerals refer to strategic raw materials, such as lithium or cobalt, that are needed for modern, hi-tech production processes, and whose supply chains are considered vulnerable to disruption.

These cover the "transition minerals" needed for renewable energy technologies such as batteries and solar panels. But they also include minerals that are vital for the technology and defence sectors, who have successfully argued that their needs are "critical."

However, these end uses are not interchangeable. Electric bus batteries are not the same as armour-piercing ammunitions. Wind power generated for public consumption is not the same as the electricity that powers privately-owned, energy-intensive data centres. Of the 34 minerals that the UK government considers critical, over half are not essential for the energy transition.[1]

When we see the term "critical minerals," we need to ask – critical for whom, and why?

Mining and geopolitics – the scramble for minerals?

If oil is the foundation of the old fossil fuel order, minerals are what Foreign Secretary David Lammy calls "the lifeblood" of the emerging green and hi-tech economy[2]. Control of these resources – which are concentrated in Global South countries like Chile and DR Congo[3] – has become a key battleground of modern geopolitics. It is on this terrain that the shape of the future world economy – the winners and the losers – will be decided.

In response to domestic economic stagnation and the rise of China, a new consensus has emerged across the political spectrum in the Global North – one that subordinates all economic and environmental goals to the imperatives of national security and geopolitical dominance.

The UK government's recent economic strategies – whether focused on minerals, trade, or industrial policy – all follow these trends. In place of cooperation, human need, and respect for ecological limits, the government is choosing to prioritise access, zero-sum competition, and energy dominance as central guiding principles.

A new scramble for minerals, defended in the language of national security, promises safety but delivers the opposite. It trades real security – affordable energy, a stable climate, and well-funded public services – for the false security of militarisation and an AI arms race. This diversion of public resources makes the world more dangerous and our lives less secure.

Vision 2035 - The UK's Critical Mineral Strategy[4]

To meet growing demand, the UK Critical Minerals Strategy sets out plans to increase support for domestic mining and processing, with a focus on lithium. This includes funding of up to £50 million and fast-tracked environmental planning for new investments. These projects are located in deindustrialised regions like Cornwall and the North East, yet promise limited long-term employment while likely exposing communities to environmental harms.[5]

The Strategy also sets out a new subset of "growth minerals" tied to the needs of priority sectors identified in the UK's recent Industrial Strategy.[6] This includes five new minerals, including copper – used for electricity infrastructure – and beryllium – a crucial input for fighter jets.[7]

Since most critical minerals are not found on UK territory in sufficient quantities, the government is also facilitating private investment overseas and is leaning heavily on trade deals and bilateral agreements with producer countries. At least 12 such minerals agreements, with the likes of Indonesia and Kazakhstan, have already been signed since 2022.[8]

Minerals and the Global South

Extraction and economic sovereignty

Since the earliest days of empire, colonial powers have relied on the Global South as a reservoir of cheap raw materials. Mining was one of the defining practices of colonial plunder in Latin America, Asia, and Africa. Today's global trade, tax, and financial systems reinforce these unequal dynamics.

Trade and investment rules – outlined in bilateral deals and World Trade Organisation (WTO) regulations – prohibit the use of tariffs, subsidies, and other industrial policy tools – the same tools that the UK and every other rich country historically used to industrialise and develop their economies.[9] These rules also restrict access to critical and lifesaving technologies, limiting the ability of Global South countries to develop everything from local pharmaceutical industries to mineral processing capabilities.[10]

Unfair trade rules prevent most Global South countries from leveraging their resource wealth to diversify economies and serve local needs. Instead, countries are compelled into adopting the extractive roles imposed on them through colonialism – exporting raw materials like minerals in their cheapest form, and importing expensive essentials from abroad, such as energy, food, and manufactured goods. Where industrialisation exists, it is often low-paid, and low value-added assembly work oriented towards foreign markets, in sectors such as garments in Bangladesh[11] and agriculture in Morocco.[12]

The results are ***structural deficits*** that exacerbate financial instability, fuelling inflation, currency weakness, and chronic foreign debt. Countries rely on mineral extraction by necessity rather than choice, as these exports generate the US Dollars and Euros needed to pay off foreign debts and buy essential imports, which cannot be done using local currencies.[13]

Yet countries have little control over global mineral prices, many of which are set by financial actors in the City of London, on the notoriously volatile ***London Metal Exchange*** or through opaque benchmark assessments carried out by ***Price Reporting Agencies***. So, when prices fall, foreign debt burdens become impossible to sustain, forcing countries into the hands of the IMF and World Bank. These institutions condition their "assistance" on destructive austerity programs or, more recently, "de-risking" policies that use public funds to guarantee foreign investors' profits. The net result reinforces the very dependency that generates crisis and widespread poverty in the first place.[14]

The global rush to reindustrialise, exemplified by the UK's recent Industrial Strategy, now threatens to cement this asymmetry even further. With wealthy states increasingly breaking with orthodoxy to pursue green industrial policies, poorer countries with ambitions to ascend the value chain and reduce import dependence remain financially crippled by debt and constrained by unequal trade and investment relations.[15]

ISDS – foreign corporations' secret weapon

Rich country governments and investors play an outsized role in defining and enforcing trade rules to secure cheap imports and profitable investments. A key mechanism here is Investor-State Dispute Settlement, or ISDS – a provision in investment agreements that allows foreign corporations to sue governments in secretive "corporate courts" for policies they argue harm profits.

Since 2015, critical mineral investors have filed over 60 such claims globally against government policies like tax changes or environmental protection laws. 15% of these cases were filed by British investors under UK treaties, while 80% of recipient states are in the global South. **At least $5 billion of public money has been awarded to critical minerals investors through this process.**[16]

The true power of ISDS is political, rather than financial. The mere threat of a multi-billion dollar claim disciplines governments to prioritise foreign investors over the public interest. Recent UK and Chinese cases challenging Mexico's lithium nationalisation serve as warnings to other producer countries about the potential cost of ambitious reform.

The UK rightly left the Energy Charter Treaty in 2024 because its ISDS clauses threatened climate goals. Yet it continues to defend these clauses in its other agreements. To be a genuine partner, the UK must exclude ISDS everywhere, granting Global South countries the policy space they need to govern their resources equitably and pursue their own green transitions.

Miners in Potosí, Bolivia. Known as "the mountain that eats men," this 16th-century silver mine famously financed the Spanish Empire. It now yields critical minerals like tin and zinc.

Mining and local communities

The imperative to extract in producer countries means profits for multinationals, and kickbacks for well-connected public officials. But for local communities, mining is all too often synonymous with displacement, pollution, worker exploitation, and social conflict.

Mining is one of the most environmentally destructive forms of economic activity – destroying ecosystems, contaminating local air, and releasing toxic wastes into water supplies. **These effects can always be mitigated but never fully eliminated.** Mines tend to be located in impoverished regions home to indigenous, peasant, and other historically oppressed minority groups. Uprooted from their territories to make way for huge projects, many times without consent, they often suffer from alarming rates of cancer and respiratory illnesses, alongside local mineworkers who face dangerous working conditions. These communities become "sacrifice zones" of the global economy, bearing the costs of mass consumption elsewhere.[17]

The mining sector operates in isolation from the local economy, generating few positive spillovers. Modern extraction is hugely capital-intensive, meaning that it creates few local jobs. Machinery and technology are imported from abroad, while minerals are exported in unprocessed form as inputs into industrial processes elsewhere. Mines are typically owned by foreign multinationals, who repatriate their hard currency profits to tax havens abroad, rather than reinvesting them locally. Though packaged as "development," this model ensures that the communities enduring its environmental and social burdens rarely share in its rewards.

When communities mobilise to challenge these conditions, they often face violence from local police or private security forces tied to mining companies.[18] Even when these mobilisations lead to victories, such as the denial of permits for mine expansions, companies can resort to ISDS. This allows them to sue governments for billions in compensation, effectively punishing them for implementing policies that protect their people and their environments.[19]

Case study: Zambia

Zambia is a key battleground of the new economy. As a top global producer of copper and cobalt – minerals essential for electrification – the country is at the centre of the modern scramble for resources. Its history, however, provides a sobering lesson in the pitfalls of mineral-led development.

Large scale extraction began during the colonial era, with British corporations like Anglo American running the copper mines that powered electrification in the Global North. After independence in 1964, the government nationalised the mines. Revenues were used to build a welfare state, but failed to diversify the wider economy.[20]

By 1973, copper represented 90% of Zambian export revenues. When prices plummeted by over 200% a year later, the country faced economic collapse and was forced into the hands of the IMF. The resulting austerity and privatisation gutted the economy, hitting women and the poorest hardest.[21]

With the mines back in foreign hands, Zambia's dependency continued. Profits vanished into offshore tax havens while pollution and rights violations accumulated at home. A decade ago, War on Want estimated that corporations like Glencore were using intricate tax avoidance strategies to deprive Zambia of up to $3 billion a year.[22] And in 2019, villagers successfully took Vedanta Resources to the UK Supreme Court for poisoning a critical water source.[23]

On the eve of the pandemic, the Zambian government was spending 30% of its budget servicing foreign creditors.[24] As the world locked down, global demand for copper crashed, and Zambia became the first African country in the pandemic era to default on its foreign debt.

Today, driven by high mineral demand and geopolitical competition, Zambia is attempting to leverage its resource wealth to capture more value. This includes pursuing larger equity stakes in new projects, enforcing local content rules to boost the participation of domestic suppliers,[25] and partnering with neighbouring DR Congo to build a regional electrical vehicle battery supply chain.[26] Alongside other African governments, it is championing a UN Tax Convention to curb corporate tax avoidance.[27] None of these policies are golden bullets, but together they represent a significant affront to the anti-development status quo.

Yet the push for economic sovereignty is fraught with constraints. A parallel scramble for influence threatens to replicate existing patterns. The US-led Lobito Corridor infrastructure project aims to facilitate mineral extraction to ports on the Angolan coast.[28] A Green Growth Compact with the UK similarly seeks to open new frontiers for British investors to profit.[29] And the discovery of vast new copper deposits by KoBold Metals, a Silicon Valley startup backed by Jeff Bezos, raises the perennial question: will this investment lead to genuine sovereign development or

merely a more technologically advanced form of extraction?[30]

Zambia remains caught between an ambitious vision for structural transformation and the enduring logic of unequal exchange that has defined its place within the global economy for over a century. The outcome of this struggle will determine whether the energy transition heralds a more just and equitable era for resource-rich nations or simply reinforces historical dependencies under a new guise.

Towards a globally just approach

Supply side

As a first priority, the UK must support Global South countries to leverage their resource wealth to escape commodity dependence and develop domestic green industrial capacity aimed at meeting local needs. This requires far more than the new Strategy's symbolic references to "local value creation." It calls for a fundamental shift towards genuine partnerships grounded in a more humble and people-centred view of the UK's place in the world – one that looks beyond securitisation and cost minimisation, and that champions both the ***economic sovereignty*** of producer countries and the ***territorial sovereignty*** of their mining-affected citizens.

To facilitate such partnerships, future UK agreements – whether FTAs, investment treaties, or bespoke minerals deals – must break from the restrictive, antiquated model of "free trade." They must instead respect the right of producer countries to implement localisation policies relevant to their context – including tariffs, local content requirements, and export bans on unprocessed minerals – and to set conditions on foreign investment, such as requirements around joint ventures and mandates on value addition. To further protect the policy space of governments, the controversial ISDS mechanism must be excluded from all current and future agreements. The UK can also pledge to refrain from using WTO rules to dispute climate and development-friendly initiatives promoted by Global South states. [31]

As holder of the world's eighth largest portfolio of clean energy patents, the UK has a particular responsibility to facilitate the transfer of green technologies, particularly in areas such as wind energy where it holds an advantage.[32] These technologies should be treated as global public goods, whose sharing is a prerequisite for equitable green industrialisation.

Value addition needs to be truly sovereign – directed by producer country governments and communities, and not merely feeding into supply chains driven by UK-based corporate interests and definitions of criticality. As a consumer rather than a producer, the UK should actively take the lead from multilateral and Southern-led initiatives like the **African Union's Green Mineral Strategy**[33] and the newly-launched **UN Task Force on Critical Energy Transition Minerals**.[34] It must also respect ambitions towards greater state involvement in the mining sector, such as Mexico's lithium nationalisation project.

As the UK Strategy admits, huge upfront costs, long payback periods, and volatile prices make access to finance a key constraint for mining companies globally. This gives the UK government a degree of leverage through the support it provides to mining projects overseas, such as **UK Export Finance** loan guarantees, as well as specific packages contained within bilateral deals and contracts.[35] Instead of merely derisking projects for private interests, access to public finance should be conditioned on securing public value through technology transfers, training, and rights-based governance.

These conditionalities can help ensure that the aspiration for sovereign industrialisation from producer governments does not come at the expense of polluted land or displaced communities. ***Free, Prior and Informed Consent (FPIC)*** must be championed as a non-negotiable principle within the UK's mineral Strategy, respecting the territorial sovereignty of affected communities. Negotiating robust ***Community Benefits Agreements***, in which mining-affected communities actively shape the terms of local investment, must become binding norms for UK firms and investors.[36]

These two mechanisms can be central pillars of a new ***Business, Human Rights and Environment Act,*** which would legally require UK corporations to prevent abuses in their global operations and supply chains.[37] Additionally, the UK must ensure its own mineral-related agreements with governments are not negotiated in secret, as is currently the case. Deals must be transparent and subject to democratic scrutiny, enabling meaningful input from local communities and civil society.

Lithium fields in Chile's Atacama Desert. Chile is home to the world's largest lithium reserves.

Finally, the UK must critically assess the central role it plays as a global hub of mining finance and trading, including as home to the London Metal Exchange and multiple Price Reporting Agencies. Financial regulations should reflect the ripple effects that pricing outcomes determined in the City have on the economies of vulnerable producer countries. This means

regulating to limit the influence of short-term speculators over long-term investors – and not simply creating new financial instruments, as the Strategy suggests.

This comprehensive approach should not be viewed as a charitable concession, but as a strategic investment in resilient and equitable partnerships with sovereign partner countries and their mining-affected communities. This principle must also extend to China, whose substantial role in mineral and green technology supply chains should provide the grounds for respectful engagement as a partner with unprecedented levels of expertise, and not a rival to be outflanked.

Demand side

A just approach to minerals must look beyond supply to confront the UK's huge material footprint, which is driven by the investment and consumption patterns of the wealthiest. With the majority facing higher bills, poor transport and declining public services, a credible Strategy must redirect mineral use towards collective needs – delivering tangible improvements in affordability and living standards, rather than servicing the luxury consumption of the few.

The UK's per capita consumption of metal ores has doubled since 1990.[38]

The Strategy's stated aim is to reduce reliance on imports. Yet its own projections show this failing on its own terms. **UK demand for copper is projected to double by 2035, while lithium demand is set to skyrocket by 1,100%. For a country that makes up less than 1% of global population, this represents 6% of projected global lithium supply for that year – or around eight times our fair share.[39]**

Government targets for domestic lithium extraction in Cornwall meet barely 15% of our cumulative needs over the next decade. Simply greening our current pattern of resource use without changing this model would clearly require an unprecedented – and destructive – global mining boom. This will multiply burdens on mining-affected communities, without doing anything to improve stagnating living standards at home. Excessive hoarding of the global minerals pie risks depriving Global South countries of the resources needed to pursue their own development and carbonisation agendas.

Effective demand reduction requires joined up thinking across various government departments. Minerals policy is ultimately a question of resource use and allocation across sectors, as the Strategy's own focus on "growth minerals" suggests. Research shows that adopting an ***"efficiency and sufficiency"*** approach to the economy could slash UK energy demand by over half without sacrificing quality of life.[40] This means actively shaping a different demand profile for minerals, beyond the assumptions that currently guide the UK Strategy.

High-quality public transport and green infrastructure must be at the heart of this "public pathways" approach.[41] Public investment in electrified buses and railways is proven to improve living standards and affordability, while drastically reducing mineral needs compared to a wholesale transition to private electric cars. Efficient urban planning promises a shift away from car dependency and increased connectivity for millions. One study found that prioritising public transport over large private electric vehicles and motorway infrastructure could cut projected lithium demand in the US by up to 92% and lead to a net increase of 1.8 million jobs (or roughly a quarter of the unemployed US population).[42]

As an island nation and nuclear power with the world's sixth largest military budget, the UK must also reassess what true security means. Military products are a key source of current and projected demand for minerals, yet further militarisation is not a viable route to revitalising or decarbonising the British economy. While military spending has grown in recent decades, employment in the sector has fallen.[43]

Militaries are huge emitters, responsible for an estimated 5.5% of global greenhouse gases.[44]

Military spending primarily benefits arms companies and their shareholders, diverting billions in public funds from solutions that address the affordability crisis, while exacerbating conflicts and tensions overseas. Echoing the Trades Union Congress' call for **"wages not weapons,"** public investment should instead be directed to the food, housing, and energy systems – where private markets continue to fail the UK public.[45]

This logic extends to the government's promotion of data centres, which generate few jobs, strain our electricity grid, and compete for the very resources needed to power a just transition. Through electricity infrastructures and semiconductors, AI is driving considerable demand for a range of minerals. Technology and innovation must remain vital for the British economy, but subordinated to human needs and ecological limits, and not just the profit motives of big technology companies.

Resource-efficient public decarbonisation pathways require that a clear distinction be made between essential and non-essential end uses for different minerals. Following International Energy Agency analyses of green energy pathways, the UK must demarcate transition minerals like tellurium from those fuelling escalating militarisation, such as rhenium.[46]

Finally, the UK must implement robust and *domestic* circular systems for recycling minerals, as well as promoting repair and remanufacturing, allowing us to minimise extraction overseas by keeping materials in the economy for as long as possible. While the UK has made some progress here, this must be guided by an industrial policy approach aimed at developing capabilities and secure employment opportunities through strategic investments in technology, training, and infrastructure.[47]

To meet the scale of these challenges, public investment must shift from derisking private finance towards more ambitious and direct interventions that mobilise and develop our **real resources** – our land, housing, infrastructure, and human capacities. Market-based finance has proved thoroughly incapable of funding the UK's transformation. Alternatives, from a better-capitalised ***National Wealth Fund*** taking direct equity stakes in projects,[48] to a ***"Green Planning"*** approach to credit guidance and coordination between public bodies, are rooted in a key insight: strategic public investment creates public assets not liabilities.[49] It generates secure jobs and robust wages, and builds the economy from the ground up, moving beyond subsidising private risk to securing public and equitable returns.

Conclusion

Despite recent headwinds, the energy transition remains an opportunity for us to build a fairer, cleaner global economy – but only if we choose justice over endless extraction. This moment calls for international solidarity, public leadership, and ambitious action.

The UK's approach must prioritise sufficiency, ensuring that extraction where it does happen primarily benefits producer countries and feeds supply chains for resource-efficient, public decarbonisation pathways at home. The purpose of this new model is to solve – not perpetuate – the affordability and quality-of-life crises that have resulted from decades of policy that put private returns ahead of public good.

The UK's existing Strategy must be transformed from a tool of extraction into a blueprint for justice, marking a decisive break from the past and a commitment to a fairer future.

Recommendations

I. Transform Trade & Investment Partnerships

1. ***Guarantee economic sovereignty for producer countries*** by ensuring all UK trade and investment agreements allow for the use of local content rules, export bans, and other industrial policy tools essential for structural transformation.

2. ***Eliminate Investor–State Dispute Settlement (ISDS)*** from all current and future UK trade and investment treaties, ending the ability of corporations to sue governments for regulating in the public interest.

3. ***Ensure territorial sovereignty at the source*** by introducing a **Business, Human Rights and Environment Act** that legally mandates **Free, Prior and Informed Consent (FPIC)** and enforceable **Community Benefits Agreements** across all UK-linked mining activities.

4. ***Condition access to public finance on the creation of public value***, including technology transfers, skills training, and rights-based governance in overseas projects.

5. ***Promote financial regulations*** that limit the speculative behaviour of traders seeking short-term profits and with no intention of receiving or delivering physical minerals.

6. ***Support initiatives that boost Southern sovereignty*** like the African Union's Green Minerals Strategy and a UN Tax Convention to increase policy space for sovereign industrialisation.

II. Reduce Domestic Demand & Redirect Public Investment

7. ***Finance a public-led transition,*** by empowering the National Wealth Fund and redirecting public capital from high-material sectors (defence, data centres, private electric vehicles) to public transport, energy, and housing.

8. ***Build a strategic circular economy,*** by investing in domestic recycling, remanufacturing, and repair to reduce import dependency and create skilled, secure jobs.

9. ***Prioritise minerals for public goods***, by legally demarcating and reserving "transition minerals" for renewable energy and essential infrastructure, and not speculative AI or militarisation.

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