



## EUROPEAN POLICY ANALYSIS

# Stronger EU Partnerships for Sustainable Supply Chains

Mats Engström\*

### Summary

Environmental impacts throughout the supply chain have recently come into sharper focus. Many companies are assessing their performance not only in their own production facilities, but also in those of their suppliers. The European Union has adopted legislation aimed at greening such supply chains and has stated that it will support producers in third countries in achieving this.

However, much remains to be done in this area and there are tensions over trade restrictions such as the import ban on products linked to deforestation and the carbon border adjustment mechanism (CBAM). This European Policy Analysis describes the current situation and what the European Union has done so far to form partnerships with supplier countries. It goes on to examine similar initiatives from other states including China, the United States and Japan.

Based on this analysis, possible paths forward for the European Union are discussed. In addition to promoting renewable energy and necessary infrastructure for low-carbon transitions, more emphasis could be put on green industrial partnerships, research and innovation, and skills development. Current instruments such as NDICI-Global Europe and Horizon Europe can be reinforced in these regards, and green international partnerships could form a bigger part of the next Multiannual Financial Framework.

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The opinions expressed in the publication are those of the author.

## 1. Introduction

Today, manufacturing often takes place in global production networks (Gereffi 2018, Hauge 2023). This has changed the conditions in which climate and environment policy is made and implemented. For example, much of the climate impact from the manufacturing of goods arises from production networks that extend beyond the EU's borders, and these are different for each product group. For new motor vehicles, only about 10 per cent of greenhouse gas emissions arise from the production site of the car company, 90 per cent from the supply chain. Similar pictures can be painted for other environmental problems (Jungmichel et al. 2017, De Marchi et al. 2019).

It thus comes as no surprise that the governance of supply chains has gained attention both in voluntary environmental action, including by the financial sector, and in the development of mandatory instruments (Vermeulen & Kok 2012, Engström 2022a). For example, motor vehicle companies in the EU are now putting strict demands on their suppliers. There is a significant academic literature on governance of supply chains in general, and an emerging debate on environmental aspects (Partzsch 2020).

In addition, the COVID-19 pandemic and Russia's war on Ukraine have caused severe disturbances, making economic security and more resilient supply chains a key policy issue, for example in the European Union (European Commission and the High Representative 2023).

After several voluntary initiatives, policy action in Europe is now intensifying. Following the national example set by France and a draft law in the Netherlands, the European Union is moving forward with regulatory frameworks that affect supply chains, such as [mandatory due diligence for companies](#) and climate disclosure under the [corporate sustainability reporting directive](#).

In addition, there are several sector-specific rules, for example on import of carbon-intensive goods (CBAM),<sup>1</sup> food, and products linked

to deforestation, as well as upcoming product groups under the EU Eco-design for sustainable productions regulation.

And the EU is not alone in taking such actions: California requires large companies to report on carbon dioxide emissions in their supply chains from 2027 onwards, and voluntary initiatives are having significant impact across the world. Methodologies for measuring environmental footprint in supply chains are being developed and standardisation is on the agenda, in particular regarding climate by the International Sustainability Standards Board, ISSB.<sup>2</sup>

**'The greening of supply chains is to a large extent driven by customer demand, actually existing or which companies envisage will appear in the future.'**

The greening of supply chains is to a large extent driven by customer demand, actually existing or which companies envisage will appear in the future (Su et al. 2023). Still, EU legislation has caused negative reactions in other parts of the world, with several low- and middle-income countries accusing Europe of not consulting with partners before decisions are made, or even of enacting 'green protectionism', i.e. restricting trade to benefit domestic firms but under the guise of climate and environmental policy.

Behind such accusations lies the fact that new instruments for the governance of supply chains are affecting producers in low- and middle-income countries outside the OECD, often labelled the 'global South'. This is the case both for voluntary measures driven by companies and civil society, and for legislative measures from the EU and others. For example, an analysis by the TIPS institute describes the many ways in which the EU Green Deal establishes new conditions for companies in South Africa (TIPS 2021).

<sup>1</sup> The impact of CBAM on international relations is analysed in a forthcoming SIEPS analysis.

<sup>2</sup> <https://ghgprotocol.org/blog/statement-new-standard-international-sustainability-standards-board-issb-requires-disclosure>

Simultaneously, countries in the global South with mineral deposits or big renewable energy potential might benefit from increased demand from Europe and other parts of the ‘global North’, where there is a need to increase imports in order to replace fossil fuels with renewable energy and electric vehicles. Indonesia, Chile and Senegal are just a few examples of states trying to avoid being subjects of a new ‘green extractivism’ by supporting their domestic industries to move up value chains, for example by refining more minerals and producing battery cells. They are calling for substantial cooperation with Europe to achieve this aim (Ghost et al. 2022).

I have previously described some ways by which the EU might address such concerns (Engström 2022b). This European policy analysis delves deeper into the issue of greener supply chains, compares current EU efforts with those of other actors such as China and Japan, and ends with some policy recommendations. It is based on a review of the extensive literature, other desk-top research, several interviews with key policy-shapers and experts, and participation in roundtable discussions.

## 2. Current EU policies

The European Union already supports the greening of global supply chains in several ways. Regulation is advancing both horizontally (due diligence, corporate sustainability reporting) and in specific areas (CBAM, deforestation, sustainable product groups).

When it comes to support for partner countries, the EU’s new approach to development cooperation, embodied in the [NDICI-Global Europe instrument](#) which merges different kinds of EU economic support and in the [Global Gateway](#) label for connectivity initiatives, includes some support to greener production. One important part is promoting the decarbonisation of energy systems, a crucial precondition for low-carbon supply chains. The [Switch-to-Green facility](#) encourages, in particular, the transition to a circular economy. However, support to greener industrial production has so far been limited (European Commission 2022).

Member States are also active in this area. Germany is [one such example](#), with a national supply chain law and extensive financial support implemented

by the German development agency GIZ. [Textile supply chains](#) is one of several focus areas. The Netherlands has a well-developed policy since many years (Tillväxtanalys 2020). In Sweden, the development agency SIDA [supports](#) the development of more sustainable supply chains, for example in Tanzania and Bolivia.

Through the [Team Europe approach](#), EU institutions and Member States work more closely together vis-à-vis third countries than before. There is, for example, a [Team Europe Initiative on Sustainability in Global Supply Chains](#), with seven member states (including Sweden) participating in addition to the European Commission. As a first step, an EU Helpdesk will be set up in 2024 as a one-stop-shop in relation particularly to the due diligence directive. The helpdesk will offer information in multiple languages and provide technical support to help stakeholders in partner countries to identify the most appropriate accompanying measures available to them at national, European, or international level. The secretariat for the initiative is run by Germany’s federal development agency GIZ and so far, €10 million has been committed as core funding. Participants in the TEI are also discussing gaps in current policy measures to support partner countries, and the initiative could therefore develop further in the years to come.

**‘Security of supply in terms of resources has come to the forefront in the wake of the COVID-19 pandemic and the disruption of energy imports from Russia.’**

Another aspect on the rise alongside sustainability concerns is de-risking. As already mentioned, security of supply in terms of resources has come to the forefront in the wake of the COVID-19 pandemic and the disruption of energy imports from Russia. A significant factor is also an increased awareness of dependencies on China. In its recent economic security strategy, the European Commission and the High Representative emphasise both domestic measures and partnerships with others who have common interests (European Commission and the High

Representative 2023). This includes reinforced partnerships with developing countries that could play a bigger role in global value chains. According to the Commission and the High Representative, ‘EU financial and technical support to low- and middle-income countries for industrialization, the green transition and bridging the digital divide is not only valuable on its own and creates positive effects for the local communities, but also contributes to our economic resilience by promoting a more diversified global economy’.

Critical raw materials is a specific example where de-risking is taking place. The EU strategy on access to such materials includes statements about improved partnerships with other parts of world (European Commission 2020). Several such bilateral partnerships are already under way, with framework agreements on cooperation that include the promotion of greater local value capture in resource-rich developing countries.

**‘Living up to promises will require significant EU and member state efforts, which could put strain on staff resources and budget lines.’**

At the time of writing, the EU has signed nine [strategic partnerships](#) with third countries to develop critical raw materials, often labelled ‘Flagship projects’ under the Global Gateway.<sup>3</sup> However, in most cases the concrete content of such support remains to be fleshed out. Living up to promises will require significant EU and member state efforts, which could put strain on staff resources and budget lines.

### 3. Initiatives from third countries

When discussing what additional action the European Union can take in building partnerships, it is useful to have an overview of what other major actors are doing. Often, their activity consists not only of initiatives directly linked to production facilities, but also support for infrastructure, renewable energy and skills. To lower negative environmental impact, several kinds of measures are needed. Low- and middle-income countries

are also asking for such packages of action in order to combine greening of production with local economic development.

#### *China*

Ten years on from the launch of Belt and Road Initiative (BRI), it is evident that Chinese investment in improved connectivity has had significant impact. China’s development finance institutions provided \$500 billion for this purpose during the period 2008–2021 (Gallagher et al. 2023). This has brought benefits for several countries in the global South, although there is also criticism over debt traps and over how Chinese companies sometimes have behaved (Ye 2022). Investments have contributed to economic growth while at the same time causing increased carbon dioxide emissions (Gallagher et al. 2023).

Now is the time for a changed approach, according to China’s leaders, one which will focus on quality and on ‘softer’ projects rather than costly railways and harbours. When Xi Jinping addressed the Belt and Road Forum in October 2023, he mentioned eight priority areas for the future (Xinhua 2023). The third priority, ‘practical cooperation’, the fourth, ‘green development’, and the fifth, ‘scientific and technological innovation’ are of particular interest to this analysis.

Among the cooperation areas Xi mentioned were: vocational education; green innovation; training opportunities for 100,000 people from partner countries; more joint laboratories, and support to young scientists. These proposals seem attractive to many developing countries. There are already examples of joint research institutes while thousands of students from ‘the global South’ have enrolled in programs at universities in China.

Cooperation on connectivity will continue with, for example, major financing windows provided by the China Development Bank and the Export-Import Bank of China. The rather new [Global Development Initiative](#) will provide more money for objectives such as food security, vaccines, green and digital development, and industrialisation.

In addition to these programs, there are many other contacts between Chinese government officials and states in the global South, including in the [BRICS+](#)

<sup>3</sup> The 2023 projects are listed [here](#).

framework. The China Council for International Cooperation on Environment and Development has also done analytical work in the area (China Council 2023).

#### *United States*

Encouraging domestic manufacturing has been a key priority for both the Republicans and to the Democratic party and remains so, with the CHIPS Act and the Inflation Reduction Act emblematic examples. However, there is also a recognition in Washington DC that supply chains will to a large extent remain transnational. For example, the United States is cooperating with the EU and other countries to secure access to critical raw materials through the [Minerals Security Partnership](#), while making efforts to promote sustainable mining. ‘Friendshoring’ is high on the agenda as a way of reducing dependency on China. Recent agreements with Vietnam and others on greening production should be seen through this lens. Cooperation on science and technological innovation is [part of the offer](#).

However, there are also tensions between those [emphasising production in the United States](#) and others [advocating further efforts](#) to build partnerships with the global South (Allan et al. 2023, Usman & Csanadi 2023).

#### *Japan*

Companies in Japan often have extensive supply chains abroad, particularly in other parts of Asia. The financial sector is also extensively engaged internationally. The Japanese government has launched several initiatives to make supply chains more sustainable, while at the same time ensuring supply (Pohlkamp 2023).

Japan has an extensive official development assistance program (ODA), towards south and south-east Asia, but also in other continents. In 2023, the infrastructure and economic assistance parts of ODA have been increased. In October 2023, the government stated that it aims to furnish \$13 billion for investments in the global South (Asia Nikkei 2023b). Through the ‘ASEAN-Japan Co-creation FastTrack Initiative’, Tokyo supports start-ups in the region. Similarly, the new Japan-Africa Investment Ecosystem Co-Creation Forum and the Africa Impact Investment Fund aims to support business to grow in a sustainable manner.

Now, the government is promoting a ‘Global South vision’ (Asia Nikkei 2024). As argued by Pohlkamp, the EU can learn from Japan’s emphasis on co-creation and local ownership.

Japan also has a strong bilateral partnership with India, which among many other things includes efforts for co-innovation of new technologies (Janardhanan et al. 2020). It has promised to invest more than \$30 billion in industrial cooperation, particularly for manufacturing and supply chains (Pohlkamp 2023).

In the area of critical raw materials, Japan is building cooperation with several countries in the global South, including for example Indonesia in Asia and Zambia, Namibia and Angola in Africa (Asia Nikkei 2023a). This will include vocational training and other support for local value chains.

#### *South Korea*

Other industrialised countries also have significant programs. South Korea is using its own experience as a ‘catch-up’ country in relation to other parts of Asia. For example, the Korean government is [supporting](#) an e-mobility collaboration centre in Indonesia. Leading companies such as Samsung are also trying to green their supply chains, with big impact in countries such as Vietnam.

## 4. Multilateral cooperation

The United Nations Framework Convention on Climate Change (UNFCCC) includes provisions on the transfer of technologies that support emissions reductions, but in practice progress has been slow. Many countries in the global South are still demanding better access to low-carbon technologies and more support for capacity building. The situation is similar in other multilateral contexts. However, the The Montreal Protocol on Substances that Deplete the Ozone Layer provides an example of how rapid global diffusion of alternative technological solutions to the damaging chlorofluorocarbons could be achieved.

Outside of formal negotiating processes, ‘coalitions of the willing’ enable ambitious states and companies to move forward in a coordinated way. The Breakthrough Agenda from the Glasgow climate meeting in 2022 is a showcase. Now 57 states including several EU member states

have promised to achieve certain quantitative targets by promoting electric vehicles, low-carbon steelmaking, renewable energy, and more. Implementing these commitments would make many supply chains greener. However, according to the latest progress report, technology diffusion needs to happen much quicker than at present (IEA 2023).

There are multilateral institutions, such as UNIDO, who have made promoting such diffusion part of their [core tasks](#), but resources are limited. The IEA plays an important role but lacks the legitimacy of UN institutions since full membership is limited to OECD members.

The German-initiated ‘[Climate club](#)’ has a wider scope than only high-income countries. There are similar ambitions with the Critical raw materials club pursued by the United States, the EU, and other (see Findeisen 2023). The G20 group also has cooperation, including the Compact for Africa.

There are also important green industrial development initiatives in what is called ‘South-South’ cooperation. In addition to China trying to label its measures as part of a developing solidarity between nations, India and Brazil play key roles. For example, Brazilian president Lula da Silva promised several supporting measures to other countries at the BRICS summit in South Africa in 2023, including for the agrifood sector. Interestingly, Indonesia is also trying to play such a role, as evident during President Joko Widodo’s tour of Africa in August 2023 (Asia Nikkei 2023c).

### ‘When it comes to the EU’s engagement in multilateral fora for greener supply chains it is hard to find a coherent line.’

When it comes to the EU’s engagement in multilateral fora for greener supply chains it is hard to find a coherent line. In the climate and development sphere, there are several cooperation initiatives, but in trade relations, including in the WTO, the EU often takes a hardline approach, criticising policies in developing countries which seek to promote their domestic industries.<sup>4</sup>

<sup>4</sup> Interviews with experts in Geneva and Brussels, 2023.

## 5. EU instruments that could be reinforced

Several opportunities for better cooperation for supply chains can be identified, based on interviews and earlier studies. The focus here is on the greening of supply chains, although many of these measures can also be useful for de-risking by diversifying Europe’s supply of critical resources beyond China.

And several reasons for seizing these opportunities to intensify cooperation on supply chains have been identified by researchers and international organisations (Rizzi 2023, IEA 2023, Engström 2024):

- Limiting climate change and other environmental problems, i.e. by greening supply chains and allowing rapid technology diffusion (IEA 2023).
- Supporting European companies’ competitiveness by helping them to reduce their environmental footprint.
- Geopolitics; balancing Chinese (and US) influence.
- Reducing the risk of trade conflicts.

So far, many EU initiatives in this field have been projects with a specific scope. There is a need for a more comprehensive and strategic approach, to build 10-15 year partnerships with key countries to green (and digitalise) supply chains, including stronger innovation and manufacturing ecosystems. This should include more strategic planning of Team Europe initiatives, which are currently often a bundling of existing national measures, as well as promoting local ownership and ensuring synergies with local development plans. Existing initiatives such as the Team Europe initiative for sustainable supply chains and Switch-to-Green could be reinforced.

In the remainder of this section I suggest some further promising opportunities:

### *Better consultations and public diplomacy*

EU policymakers recognise that there was too little outreach to other parts of the world when current trade-affecting policy measures were designed,

for example regarding CBAM, deforestation and company due diligence. More regulation affecting suppliers will come, in particular delegated acts under already adopted legislation such as the regulation on eco-design of sustainable products. The EU will need to implement better consultation procedures and improve its public diplomacy on the reasons for adopting such regulations, which include changing consumer preferences.

*Low-carbon energy systems  
and green innovation partnerships*

Improving infrastructure remains important. Better electricity grids and more renewable energy are key elements for low-carbon production. The Global Gateway needs to deliver on promises already made, for example on [mobilising 150 billion euro for investment in Africa](#).

**‘Partners countries in the “global South” are in particular asking for support to move up value-chains in agriculture and industry.’**

Partners countries in the ‘global South’ are in particular asking for support to move up value-chains in agriculture and industry. As noted above, China is already offering such support and the EU does have some projects ongoing. For example, through NDICI-Global Europe the EU supports centres of excellence in agroecology. However, the budget is limited (€300 million over seven years for the whole of sub-Saharan Africa, for example). Much more can be done, as proposed for example by African and European research universities. Establishing joint Africa-Europe centres of excellence in research and innovation could be one element, with increased funding for testing and certifying low-carbon technologies as part of it. The ongoing review of NDICI-Global Europe could prioritise such support for capacity building in green industrial transformation.

Another tool that can be better used for building capacity for the green transition in partner countries is the research program Horizon Europe. It operates mainly through calls for proposals for research. Some such calls have had a specific Africa topic. A call for proposals relevant to Latin

America is planned. However, there is scope within the program to do more to encourage research in the global South. For example by supporting excellent researchers through a second step of the [ARISE](#) program. The so-called ‘missions’ under Horizon Europe can also be given a stronger task for international cooperation. Such improvements might be possible to make quite quickly, through the ongoing [mid-term evaluation](#) of [Horizon Europe](#) and in the planning of 2025–2027 investment priorities. More radical changes, such as establishing specific Africa and Latin America windows in the framework research program, can happen after 2027 (Engström 2024).

*Developing green skills  
and institutional capacity-building*

Skills developments for greener supply chains is another key area that could be further developed. Skills development is part of the Just Energy Transition Partnership (JETP) agreement with South Africa. The [Africa regional teachers initiative](#) is another example, of a somewhat different kind. Student mobility between Europe and certain third countries is encouraged through Erasmus+. However, few African students participate. One possible action could be to have a quota for students from the global South, preferably combined with enlarging the program in the next budget review. A similar approach could be taken to the Marie Curie program for researcher mobility, where a change of the regulation might be necessary to increase the number of participants from Africa, Latin America and developing countries in Asia.

Capacity-building for greening of supply chains can also happen through twinning of relevant authorities in EU member states and third countries, for example cooperation between innovation agencies, similar to what has already been done with telecom authorities. Twinning was used successfully in preparations for the ‘Big Bang’ enlargement in 2004 and has continued with present candidate countries. There is already [support for some twinning](#) under NDICI-Global Europe, but the extent is very limited. Increasing such cooperation can have big benefits for innovation systems and green transitions in the global South, where lack of institutional capacity is often a problem.

A more direct form of institutional support is directly through the EU institutions. The European Commission organises workshops in countries affected by CBAM, for example.<sup>5</sup> Although lack of staff is an obstacle for the Commission, more could be done particularly through Team Europe coordination. Recently, the Commission announced that a specific task force for this purpose would be created (European Commission 2024)

### *Supporting trade*

Aid-for-trade is another important instrument, that can help companies in developing countries green their supply chains and comply with EU legislation (WTO 2022). A more strategic approach is needed as well as better timing. At present aid-for-trade is often available only years after trade-related measures have entered in force. For example, reporting under CBAM can be facilitated by support for more third-party verifiers of emissions. Support for participation in international standards development, and thus boosting countries' ability to enter global markets, is another important area.

Non-state initiatives are already playing an important role in helping to green supply chains. The Sustainable Trade Initiative (IDH) is a good example, for example in [helping Vietnam combat deforestation](#). The organisation convenes companies, CSOs, and governments in sustainable public-private partnerships, and is [supported](#) by the governments of the Netherlands, Denmark, Norway and Switzerland. The EU budget could include more possibilities for grants to such non-state action.

## 6. Obstacles and ways forward

Why has not more happened so far, given the political attention to climate and to security of supply?

Limitations within the current multiannual financial framework might be one reason. The

flexibility mechanisms in NDICI-Global Europe largely have been used to support Ukraine, leaving less for the global South. The Commission proposal does not include significant increases for EU-global South cooperation, and member states are against budget increases not linked to Ukraine. However, this does not explain why even simpler and rather cheap measures such as facilitating partner countries' adaptation to CBAM reporting do not get more funding.

Silo thinking might also be a reason. For example, many argued for directly or indirectly channelling part of the CBAM revenue to the least-developed countries, including decision-makers on climate and development. But in the end, only Germany pushed that issue in the Ecofin Council (where member states are represented by ministries of finance), and the European Parliament did not make it a key negotiating position.<sup>6</sup>

**'If we help industry in other countries to become greener and more competitive, our national firms might lose out, goes the argument.'**

Fear of competition is another factor that several government experts mention during background conversations. If we help industry in other countries to become greener and more competitive, our national firms might lose out, goes the argument. It is questionable to what extent this is true and the effect on competition is likely to vary across sectors. For example, low-carbon steelmaking in Brazil might pose a risk for some German steel companies, whereas European firms closer to the customers (cars, textiles, furniture) might benefit if their suppliers in third countries become greener. In areas with a rapidly increasing demand, as there is for refined critical raw materials, there might not be much of competition at all since most of the output will be sold anyway.

<sup>5</sup> Beyond workshops, the Commission 'is also gradually making available detailed written guidance, online training materials and webinars, sector-specific factsheets and a step-by-step checklist to support businesses as the transitional mechanism begins.' [https://ec.europa.eu/commission/presscorner/detail/en/ip\\_23\\_4685](https://ec.europa.eu/commission/presscorner/detail/en/ip_23_4685)

<sup>6</sup> Interview with a senior member state official.



## 7. Conclusion

The environmental footprint of international supply chains has come more into focus for policymakers, as shown in this analysis. However, recent EU legislation has not been complemented by sufficient action to support suppliers in low- and middle-income countries. This reduces the effectiveness of legislation and has already caused a pushback in bilateral relations.

**‘Europe needs to understand that the world has changed: old methods of influence are no longer as effective as before.’**

Europe needs to understand that the world has changed: old methods of influence are no longer as effective as before. This is especially true when China makes offers on support for green industrial transformations that look attractive to governments in the global South. If Europe wants

green supply chains and access to critical resources, true partnerships with third countries are needed. That requires listening to such partners and making attractive offers.

In this analysis, initiatives from other states have been described as well as ongoing multilateral cooperation for sustainable supply chains. The European Union and its member states have taken several actions, but more is needed.

In particular, bigger efforts are needed when it comes to green industrial partnerships. This should be based on dialogue with countries most affected, and could include more economic support for research and demonstration, better aid-for-trade, as well as further efforts for green skills development and low-carbon energy systems. Successful such initiatives would be to the benefit for the EU, for partner countries in the global South, and for the global environment.

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