

# Securing critical materials for critical sectors

## Policy options for the Netherlands and the European Union

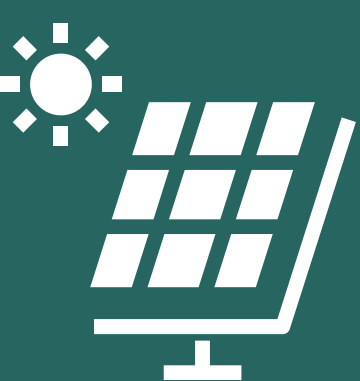
*The demand for critical raw materials, on which the Dutch economy is highly dependent, will spike - introducing undesirable dependencies due to China commanding a controlling share of the global supply. What can the Netherlands do to secure its supply of critical materials & technologies?*

### Critical sectors

NL & the EU are dependent on imported materials, components and technology for meeting their energy, transport and digital ambitions.



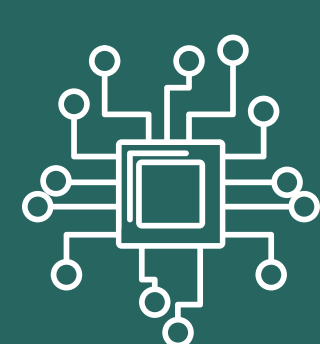
Permanent magnets in wind turbines require rare earth elements, mined predominantly in China



Manufacturing of c-Si photovoltaic panels is concentrated in a small number of countries and is led by China



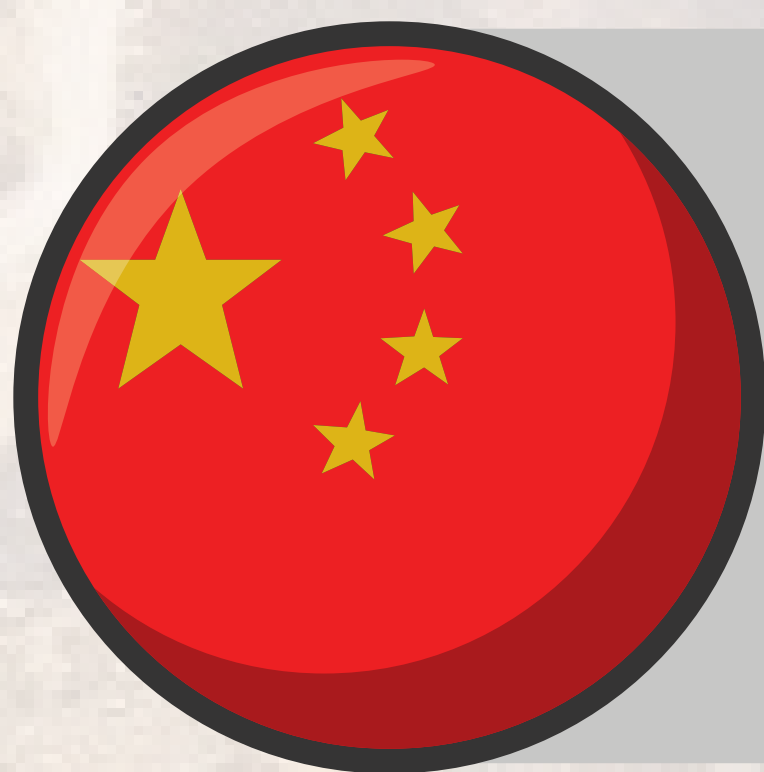
Electric vehicles require batteries, for which China, Japan and Korea are global production leaders



Developing digital technologies, such as semiconductors, requires an ever-increasing range of materials

### Strategies to secure critical raw materials (CRM)

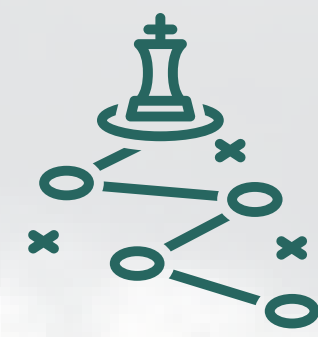
Ensuring a resilient CRM-supply chain requires states and companies to make strategic policy choices that enable supply chains to adapt and recover from disruptions.



#### China's Quasi-Monopoly

China employs a range of strategies to develop each step of domestic supply chains and secure access to strategic resources abroad, with the aim of meeting national ambitions.

### Recommendations for the Netherlands



Develop a long-term national strategy that reflects the needs of industrial actors



Support small/medium enterprises to collaborate on industrial objectives



Conduct R&D for innovative waste collection, processing and re-using



Encourage capacity-building in technical expertise for policymakers



Invest in resource-abundant countries in order to diversify supply

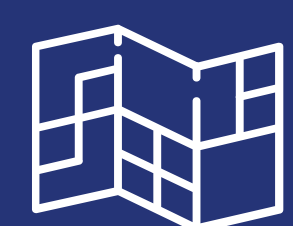
### Interventions to be supported on the EU level



Expand European Raw Materials Alliance



Support application of R&D in waste processing & recycling



Analyse EU stocks and waste flows to map potential of secondary CRM



Invest in mining expertise within the Union



Set standards for sustainable & responsible finance and mining practices



Develop strategic international partnerships

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