

# INVESTNL

# Supporting Industry in Critical Raw Materials in the Circular Economy

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# Our mission

As the Dutch National Promotional Institution, we accelerate and finance societal transitions. We remove financing obstacles, mobilise capital and provide perspective for emerging sectors.

This is how we create impact for a sustainable and innovative Netherlands.





# Biobased & Circular Economy

The only path towards a sustainable and resilient economy.

To preserve natural resources, the Netherlands aims to achieve a fully circular and biobased economy by 2050. We work towards this by reducing overconsumption and waste, and by restoring natural ecosystems. We collaborate on financing solutions and invest in companies that contribute to a successful circular economy.



## Supporting Industry in Critical Raw Materials in the Circular Economy

# Motivation

- Enhancing **strategic autonomy** and **economic security**, ensuring that circular and European clean tech sectors are less dependent on foreign supply chains, particularly for materials imported from China and other non-EU countries.
- Supporting the **energy transition**, clean technologies (batteries, electrolyzers, etc.) are crucial for achieving climate goals, but their supply chains are **vulnerable to disruption**.
- Promoting **sustainable and responsible sourcing**, the project aims was to integrate environmental and social governance (**ESG**) principles into material sourcing and stockpiling.
- **Filling a policy and research gap**, previous studies mainly **focused** on national security aspects of stockpiling, while this project emphasizes **economic resilience and sustainability** as joint goals.

# Stockpiling

## Rationale

- Traditional stockpiles serve national security goals.
- Proposed model: economic resilience + sustainability.
  - Ensure supply continuity.
  - Support ESG-compliant, circular sourcing.
  - Act as offtaker for recycling and green mining.

How could a private CRM stockpile that supports business continuity and sustainability be established with public support?

- As private actors can be reluctant to establish mineral stockpiles due to the high associated costs, it becomes a question of public interest whether companies engaged in strategic sectors should be supported in their business continuity by public instruments.
- This approach combines the private interest of business continuity with public interests related to a secure energy transition and sustainable sourcing.

A two-fold objective

- The secure economic development of companies in strategic sectors that depend on CRM;
- The stimulation of more sustainable supply chains.

Focus on clean tech

- The National Technology Strategy (NTS) focuses on energy materials as one of its ten priorities, especially in relation to battery storage and electrolyzers for green hydrogen
- The EU Net Zero Industry Act (NZIA) was developed in support of the EU's efforts to mitigate climate change and maintain industrial competitiveness, which require the expansion of its domestic manufacturing capabilities for clean tech.

Legal framework

- For the purpose of this study, the stockpile can be held by the private sector on a voluntary basis, with no legal obligation .

Location: The Netherlands

- When it comes to logistics, the Netherlands has three attractive features: (1) knowledge of and infrastructure for metal warehousing; (2) advanced logistics and customs system supporting its function as a trade hub; and (3) advantageous location at the North Sea Coast and with good connections to the rest of Europe.

# Designing a stockpile for circular industry

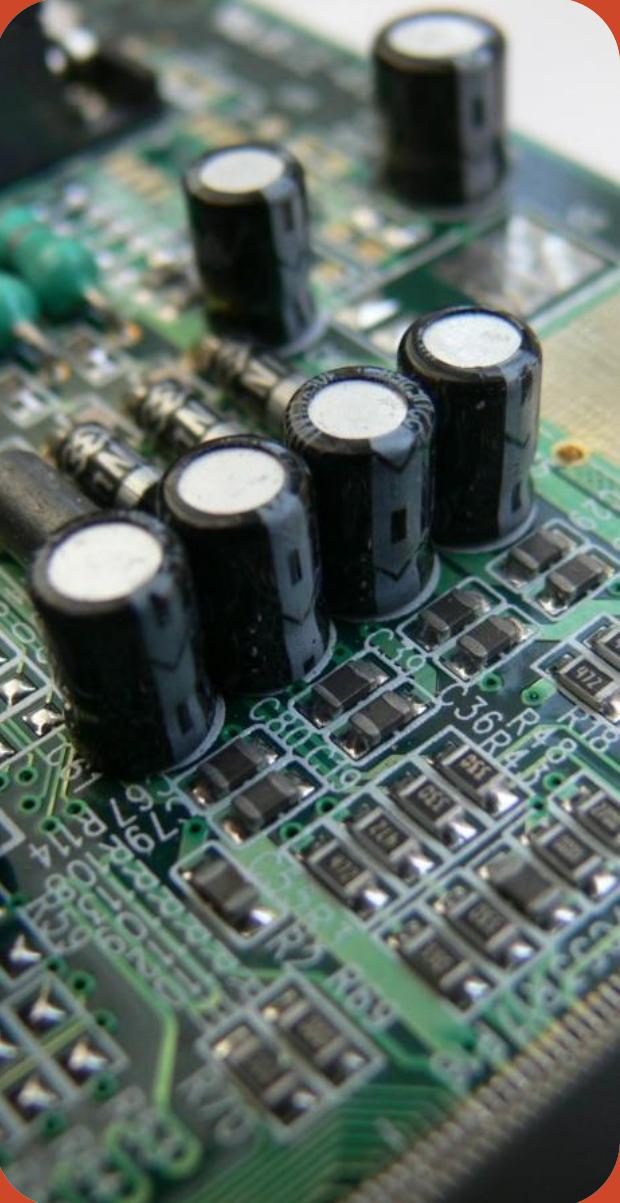
A four-step approach for establishing this stockpile is developed, following the stockpiling cycle defined by the EU: planning, purchasing, managing and deploying.

**Planning:** A stockpiling programme for the clean tech industry should start by focusing on small and medium enterprises that are trying to expand operations but that are too small to be able to stockpile their own materials. This also makes them very vulnerable to global supply chain disruptions.

**Purchasing:** As sustainability is central to the stockpile objectives, the needs of clean tech companies should be fulfilled through procurement agreements for circular and/or sustainably sourced materials.

**Managing:** A voluntary company stockpile financed through public instruments combines the pros of a public-private collaboration and mitigates the negative impacts. As such, the efficiency, expertise and flexibility of the private sector would be maintained, while the overall stockpile objectives would be aligned with public interests and not solely commercial.

**Deploying:** Using the services of specialised logistics providers would be the most effective way of arranging the physical conditions of the stockpile given that they have the infrastructure, expertise and human capital to arrange this in the most effective way.



# Q&A