

Critical Minerals: National priorities, regional initiatives, and global responsibilities

Outcomes of 2023 IGF consultations with member countries



IGF

INTERGOVERNMENTAL FORUM
on Mining, Minerals, Metals and
Sustainable Development

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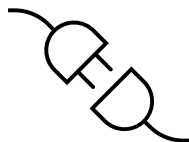


Kingdom of the Netherlands



Background

Resource-rich countries and rising demand for critical minerals



DEMAND DRIVERS The global energy transition and new digital technologies are driving demand for minerals



SUPPLY GAP Mineral demand growth is expected to outpace supply growth due to delays in new mine development and geopolitical tensions, among other issues



GROWING CONCERN The anticipated critical minerals supply gap has resulted in a wave of government actions and announcements from countries that face supply risks. At the same time, producing countries are working to seize opportunities by producing and adding value to critical minerals domestically



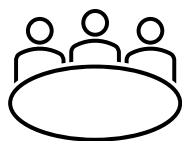
The Consultation Process

Exploring national priorities, regional initiatives, and global responsibilities



5 Virtual Consultations Conducted in October 2023 with 70 producing countries that are members of the IGF

- 1 for Latin America with 18 countries
- 2 for Africa covering 36 countries, in English and French, respectively
- 2 with for Asia-Pacific, with 16 countries, for emerging and developing economies, respectively



Roundtable Session At the 19th IGF Annual General Meeting in November 2023

- Shared key findings from virtual consultations with a broader stakeholder group
- Followed up on discussions with virtual participants
- Discussed countries' strategic priorities
- Explored issues and topics that may have been missed during the virtual consultations

A photograph of two workers in an industrial setting. They are wearing orange high-visibility work jackets with reflective silver stripes and yellow hard hats. The worker in the foreground is wearing safety glasses and black gloves, pointing towards a structure. The worker in the background is also wearing safety glasses and a headlamp. The structure they are examining consists of vertical metal bars and horizontal yellow beams. A dark blue banner with white text is overlaid on the left side of the image.

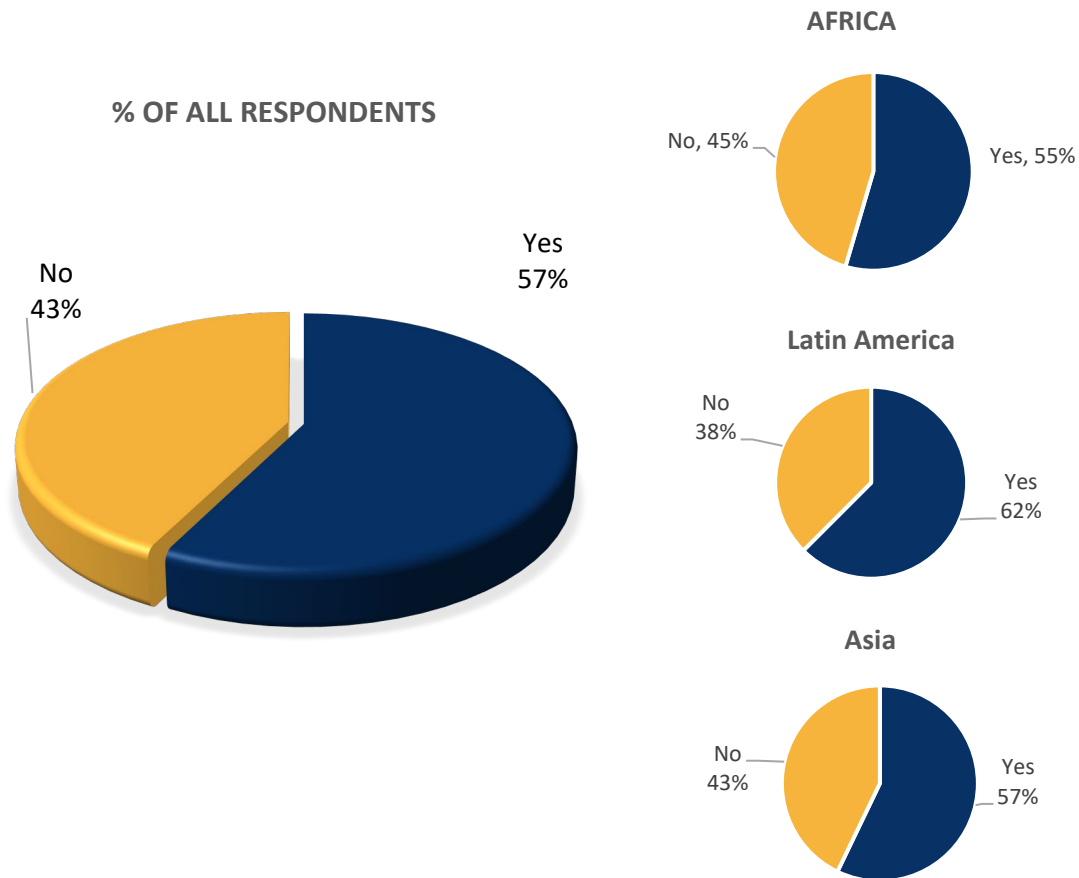
Consultation Survey Results

1. National Priorities

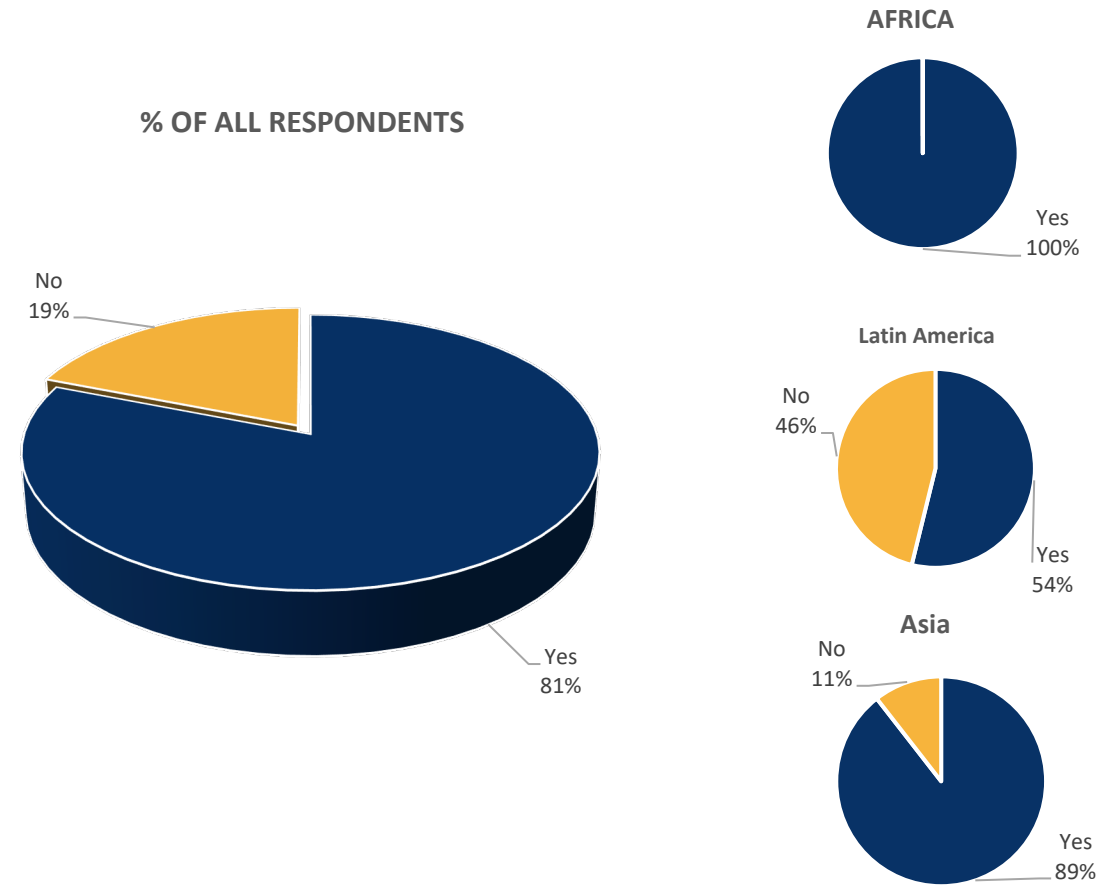


1.1 Understanding national policy dynamics

Q1. Does your country have (or plan to have) a critical minerals strategy?



Q2. Does your country have (or plan to have) a list of critical minerals?

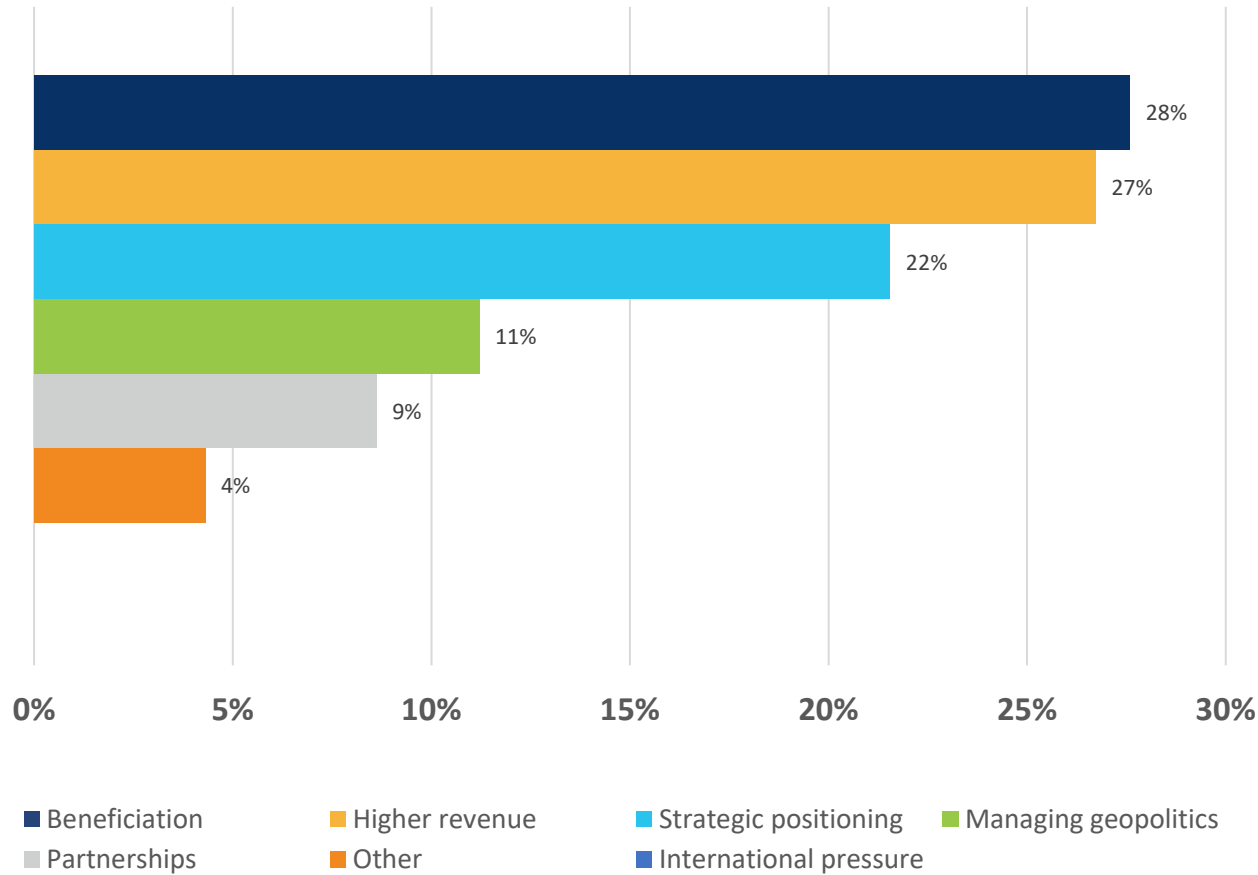


1.2 Key strategic drivers and scope of critical minerals policies



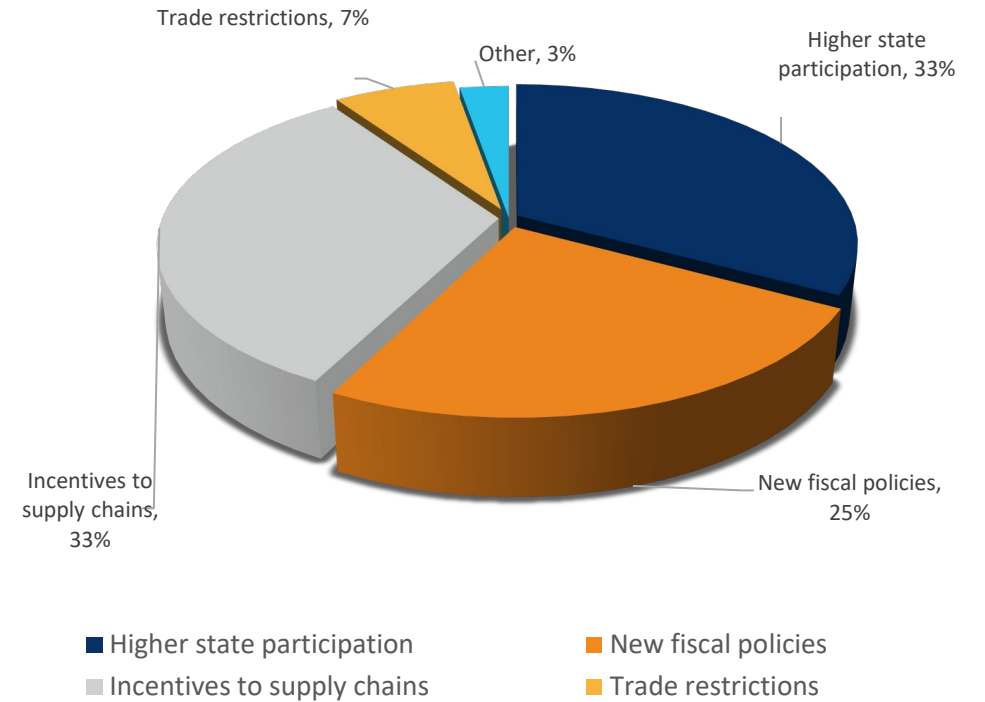
Q3. What is driving your strategy?

% OF ALL RESPONDENTS



Q4. What does your strategy include?

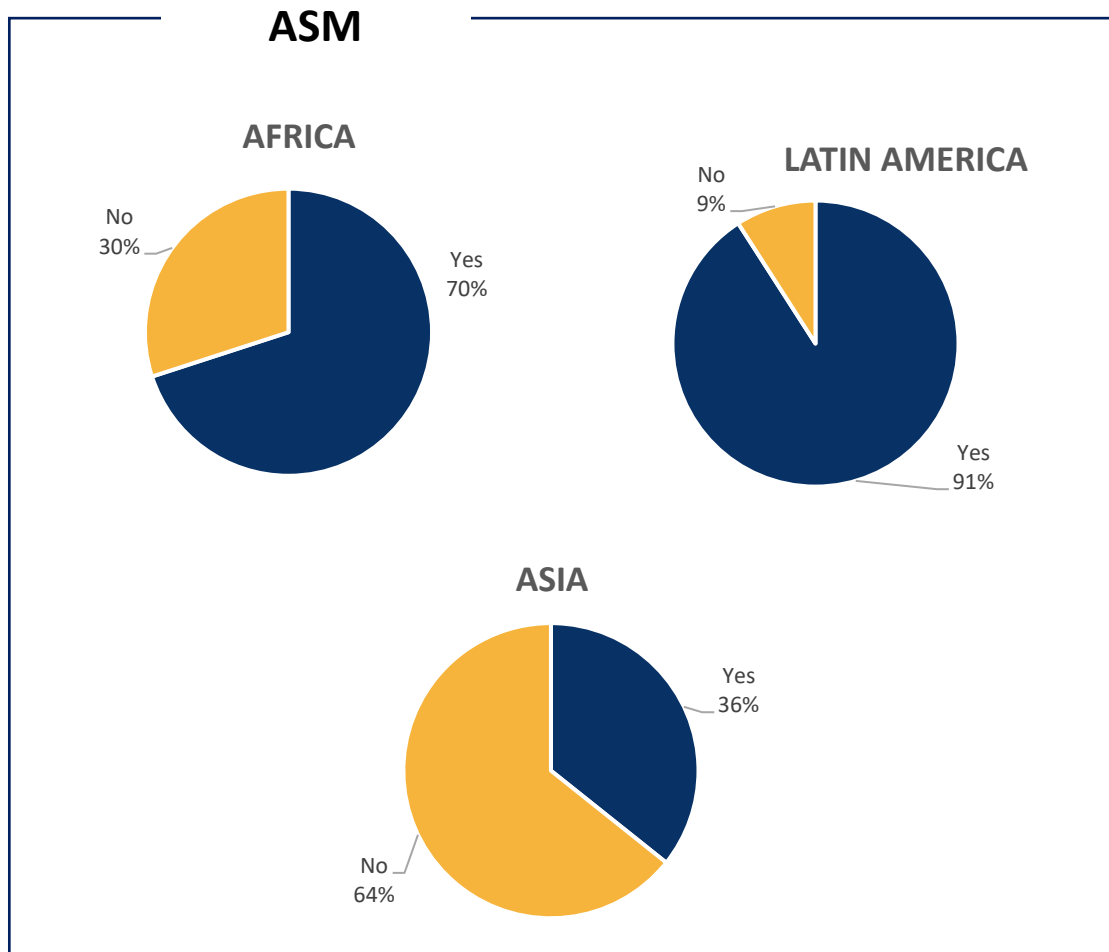
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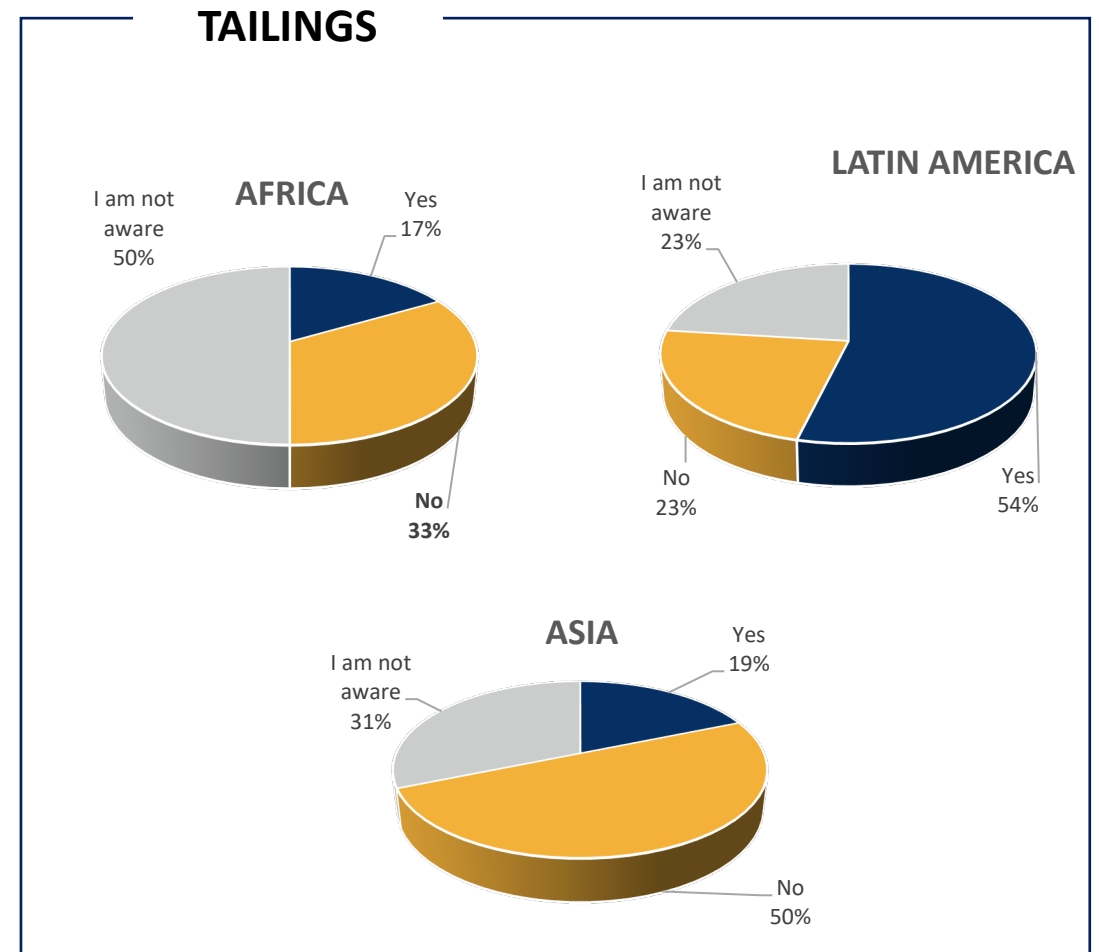
1.3 Other strategic drivers



Q5. Does your strategy include artisanal and small-scale mining (ASM)?



Q6. Does your strategy include reprocessing of tailings?

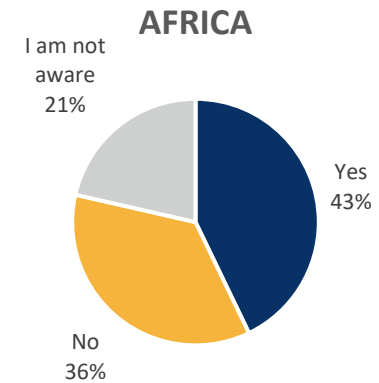
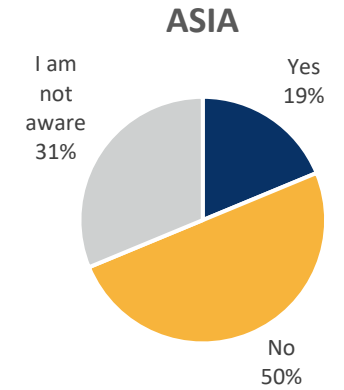
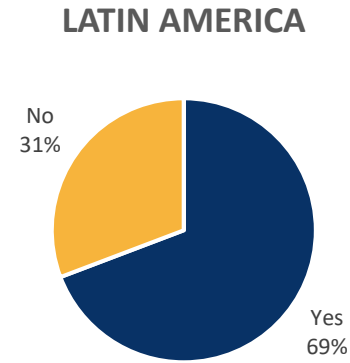
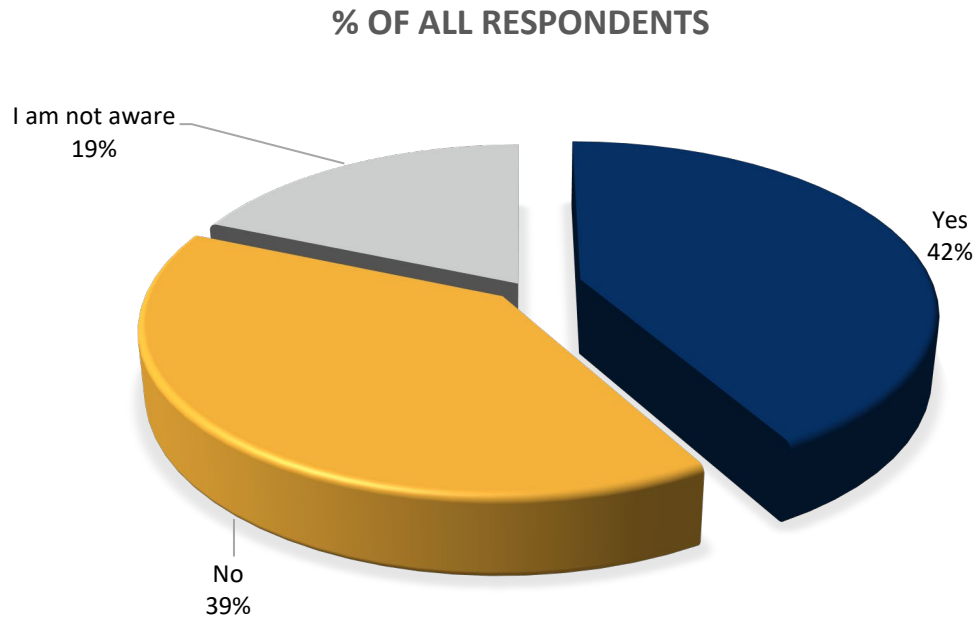


2. Regional Priorities



2.1 Understanding regional dynamics

Q7. Is your country discussing regional strategies?



2.2 Identifying priorities



Q8. What are your regional priorities*?

	Asia (emerging)	Asia (developing)	Latin America	Africa FR	Africa ENG
R&D and knowledge sharing	4	1	1	1	2
Common critical policies	3	2	3	3	3
Build supply chains	1	3	2	2	4
Fiscal regime harmonization	2	4	4	4	1

*Heatmap: Darkest colours (4) represent highest priorities, lightest colours (1) represent lowest in priorities

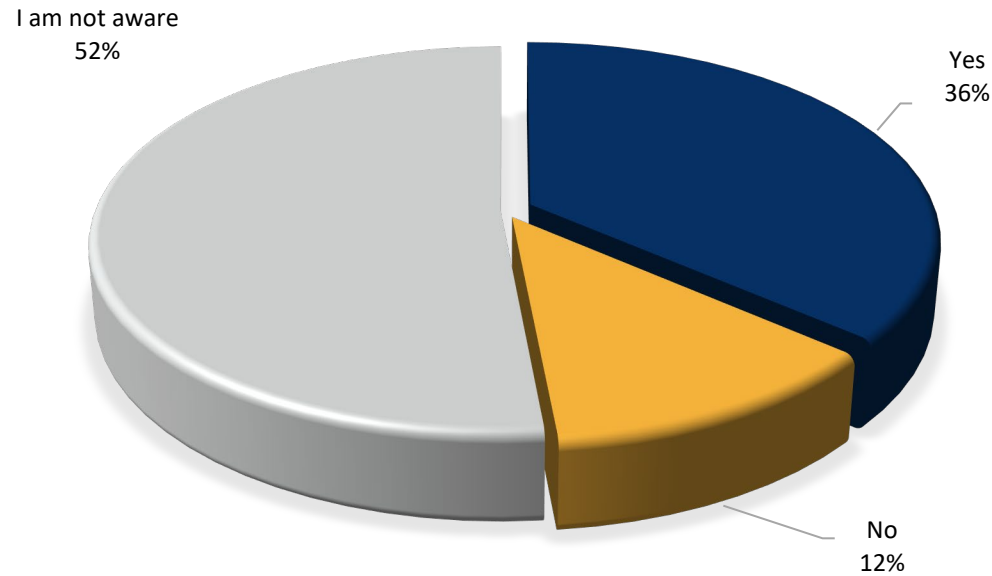
3. Global Partnerships and Initiatives



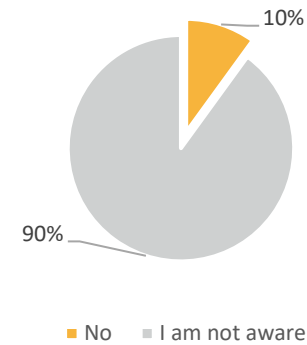
3.1 Global partnerships and initiatives

Q9. Does your country have bilateral partnerships or MOUs on critical minerals?

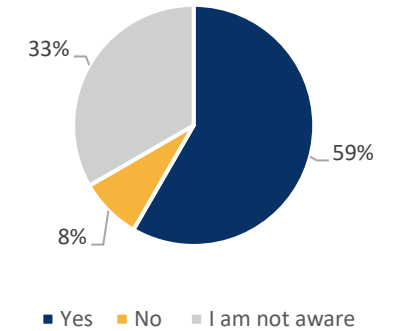
ALL RESPONDENTS



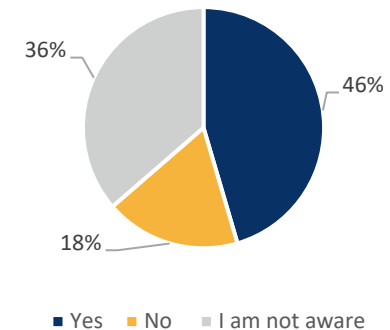
LATIN AMERICA



AFRICA



ASIA





3.2 Objectives of joining global initiatives

Q10. What are your objectives?

