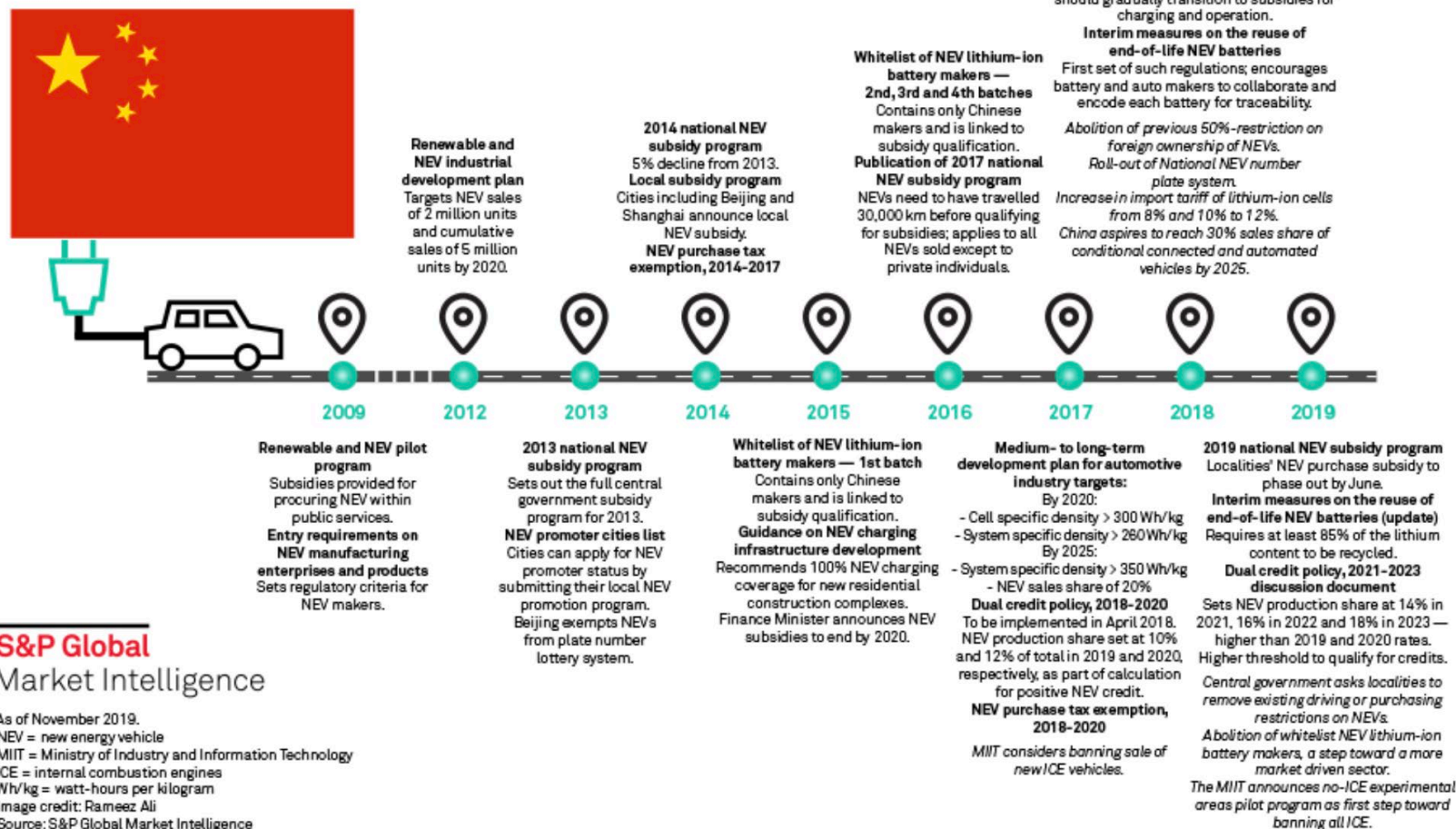


I begynnelsen skapte
Kina et sett med
subsidiar . . .

Timeline of key Chinese NEV policies, 2009–2019



S&P Global
Market Intelligence

As of November 2019.
NEV = new energy vehicle
MIIT = Ministry of Industry and Information Technology
ICE = internal combustion engines
Wh/kg = watt-hours per kilogram
Image credit: Rameez Ali
Source: S&P Global Market Intelligence

Geopolitikk, geo-economics eller strategisk kapitalisme?

Ny struktur

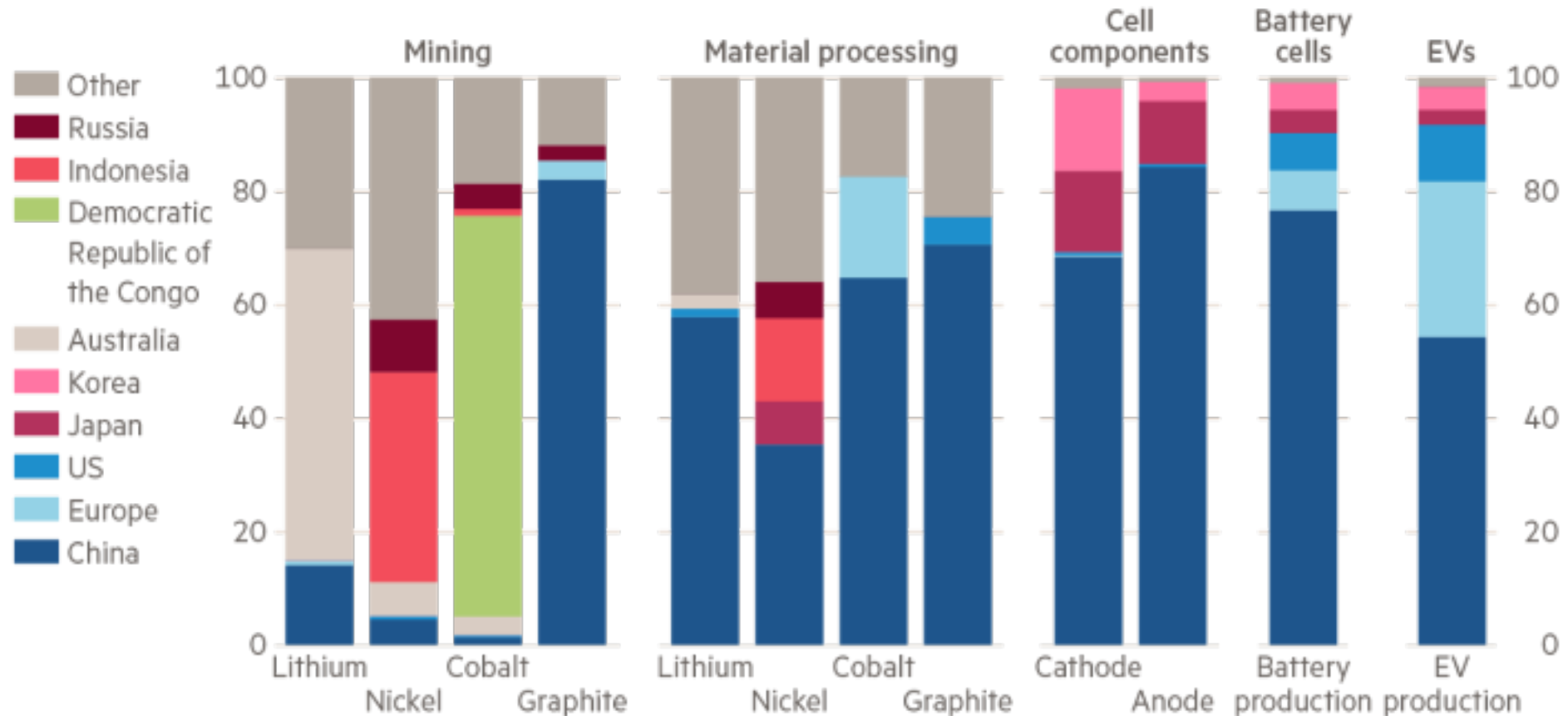
- Vi går mot en bipolar verden: USA vs Kina
- Europa må finne sin plass - 'strategic autonomy'
- Biden: vi må vinne 'the strategic competition for the 21th century'

Ny type konkurranse

- Ikke kald krig (enda...?)
- Økonomisk makt sentralt
 - Før: 'Absolutt gains' er ok
 - Nå: Pass på 'relative gains'
- Statens rolle
 - Før: aktiv industipolitikk - nei
 - Nå: aktiv

China dominates the downstream electric vehicle battery supply chain

Geographical distribution* of the global EV battery supply chain, 2022 (%)



* Refers to the country where the production occurs

Percentages for mining and EV output based on actual production. All other percentages are based on production capacity

Source: IEA





© FT

IRA: Geopolitiske grep

- Subsidiar til EV gis dersom en stor andel av batteriet er fra USA/resirkulert i USA eller fra amerikanske handelspartnere (FTA)
- Ingen subsidiar dersom batterimaterialene er fra 'Foreign Entity of Concern' (FEOC)
 - FEOC = Kina, Russland, Nord Korea og Iran
- 'Friendshoring' satt i system
- Særlig gunstig for FTA landene
 - Mexico
 - Canada
 - Marokko
 - Chile
 - Korea
- Japan lagt til etter egen Critical Raw Materials Agreement, 2023




EUROPEAN CRITICAL RAW MATERIALS ACT

- **1 EXTRACTION**
At least 10% of the EU's annual consumption for extraction
- **2 PROCESSING**
At least 40% of the EU's annual consumption for processing
- **3 RECYCLING**
At least 15% of the EU's annual consumption for recycling
- **4 EXTERNAL SOURCES**
No more than 65% of key raw material consumption in EU may come from a 3rd country.

THE NET-ZERO INDUSTRY ACT paves the way for domestic manufacturing to meet **40%** of the EU's annual deployment needs by 2030.

ANNUAL MANUFACTURING TARGETS FOR SELECT TECHNOLOGIES BY 2030

30 GW
SOLAR PHOTOVOLTAIC




36 GW
WIND



550 GWh
BATTERIES



31 GW
HEAT PUMPS

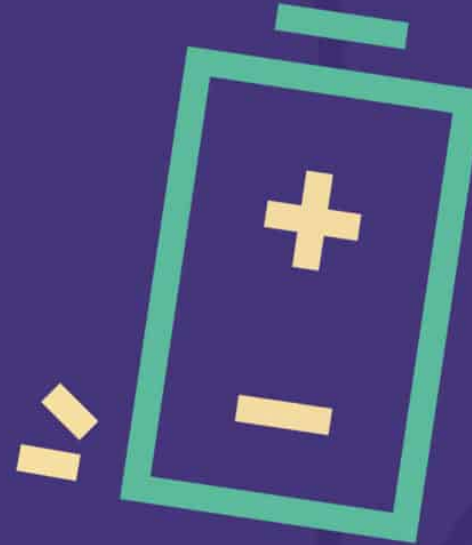


EU ELECTROLYZER MANUFACTURERS should **100 GW** boost production to achieve installed capacity by 2030.

Data accessed Mar. 16, 2023.
Design credit: Cat VanVliet.
Source: European Commission.
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Implikasj
oner for
Norge

NORGES BATTERISTRATEGI



Nærings- og
fiskeridepartementet