House of Commons

Foreign Affairs Committee

A rock and a hard place: building critical mineral resilience: Government Response to the Committee's First Report

Third Special Report of Session 2023–24

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Foreign Affairs Committee

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The Committee is one of the departmental select committees, the powers of which are set out in House of Commons Standing Orders, principally in SO No 152. These are available on the internet via www.parliament.uk.

Publication

Committee reports are published on the Committee's website at www.parliament.uk/facom and in print by Order of the House.

Committee staff

The current staff of the Committee are Medha Bhasin (Second Clerk), Ken Davies (Committee Specialist), Sasha Erskine (Committee Specialist), Hannah Finer (Committee Specialist), Matt Hole (Committee Operations Officer), Asha Mailapalli (Committee Operations Officer), Antonia McAndrew-Noon (Senior Media and Communications Officer), Chris Shaw (Clerk), Daniela Sindrestean (Committee Operations Manager).

Contacts

All correspondence should be addressed to the Clerk of the Foreign Affairs Committee, House of Commons, London SW1A 0AA. The telephone number for general enquiries is 020 7219 4050; the Committee's email address is fac@parliament.uk.

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Third Special Report

The Foreign Affairs Committee published its First Report of Session 2023–24, *A rock and a hard place: building mineral resilience* (HC 583) on 15 December 2023. The Government Response was received on 20 February 2024 and is appended below.

Appendix: Response to the Foreign Affairs Committee Report on Critical Minerals

We welcome the Committee's report and their considered recommendations. We have indicated where we agree with the Committee and where our views differ.

Conclusions and Recommendations

1. **Successive governments have failed to recognise the importance of critical minerals to the UK economy and failed to respond adequately to the aggressive capture of large parts of the market over the last three decades by China. Allowing a single country to dominate the UK's critical minerals supply chains shows a lack of foresight and has left the current Government with a mountain to climb to address the consequent vulnerabilities and protect the country's economic resilience. The Government has tried a hands-off approach, but it has left the UK too vulnerable on what is, fundamentally, a security issue.** (Paragraph 12)

Disagree.

The UK's Critical Minerals Strategy and subsequent Refresh demonstrate this Government's commitment to improving the resilience of critical minerals supply chains, in light of the confluence of challenges that could put the UK's security of supply at risk, particularly the growing global demand for critical minerals. We recognise the dominant position that China has developed across a number of critical mineral supply chains. The Critical Minerals Strategy sets out our ambitions to work with other countries to strengthen trading and diplomatic relationships, and efforts to make supply chains more diverse, transparent, responsible, and resilient. This in turn will create opportunities for UK companies overseas and make sure UK businesses are trading on a level playing field.

The UK currently uses a low volume of raw critical minerals. Our demand for critical minerals primarily occurs in relation to processed minerals or minerals that are embedded in manufactured products, many of which have complex supply chains involving many countries, not just China. Our wider reliance upon critical minerals is not new. What has changed in recent years has been the scale of their importance as technology, and demand for that technology, has changed. This is particularly true in relation to those technologies that will be at the heart of the energy transition. According to Bloomberg's Transition Metals Outlook, the volume of metals going into transition-related technologies in 2022 was 52 million metric tons (Mt). This will jump to 139Mt by 2050 in the Economic Transition Scenario (ETS) and 242Mt in their Net Zero Scenario (NZS). This is a jump of between 2.7x-4.7x compared to 2022 levels.

For over a decade, the Government has been taking action to mitigate risks in its supply chains, for example through its 2012 Resource Security Action Plan and UK involvement in European-level criticality assessments as early as 2011. The Critical Minerals Strategy sets out our approach to accelerating our domestic capabilities in a way that generates new jobs and wealth, playing a leading role in solving global challenges by collaborating with our international partners, and enhancing how financial markets can work to ensure there is investment in the resilient, diverse and responsible critical mineral value chains of tomorrow.

As the former Foreign Secretary stated in his Mansion House speech last year, we must face the inescapable reality that no significant global problem–from climate change to pandemic prevention, from economic instability to nuclear proliferation–can be solved without China. The Integrated Review Refresh sets out the cross-Government approach on China: protecting our national security, aligning with partners, and engaging with China where consistent with our interests. Our policy is to engage directly with China, including in the ISO and the G20, to preserve and create open, constructive, and stable relations. This includes working with partners and, where appropriate, engaging bilaterally with China on more challenging areas of the relationship, including, for example, on export controls introduced on graphite, germanium, and gallium.

2. **Critical minerals are of strategic significance to the UK. We welcome the Government's belated recognition of the need for a Critical Minerals Strategy.** (Paragraph 15)

Agree.

We agree with the Committee that a sustainable supply of critical minerals is strategically significant for the UK. They are vital for our economic growth, net zero transition and national security. The UK's critical minerals supply chains face risks caused by a combination of factors including, but not limited to, rapid demand growth, high concentration of supply chains in particular countries, and elevated levels of price volatility. Many of these critical minerals are produced in comparatively small volumes or as companion metals (i.e. produced as by-products of other mining activities), are non-substitutable in their applications, and have low recycling rates.

The UK approach is that, where the markets are less developed, are less transparent or have issues either now or on the horizon, we are working with business and international partners to make markets more resilient for the long term. For those minerals where the market is functioning to the benefit of the UK, the job of government is to ensure that markets are protected for the long term from future distortions.

The 2021 Net Zero Strategy identified critical minerals as a major risk to the energy transition, and the 2021 Integrated Review set out geopolitical risks in their supply chains. As a direct result of those documents, the UK published a Critical Minerals Strategy in July 2022. This has become a living document to guide government action, as illustrated by the Refresh in March 2023, which recognised the changing global environment and set out our progress and next steps. Parallel work within the Department for Business and Trade (DBT), including the Advanced Manufacturing Plan, the Critical Imports and Supply Chains Strategy and the Battery Strategy, demonstrate the tight linkages between critical minerals and other strategic areas.

3. **The Strategy and its Refresh form the basis of a useful framework to underpin the varied strands of government policy that will be required to improve the long term resilience of UK critical minerals supply. However, the scope of the Strategy is too broad to be helpful as a guide to industry, which needs realistic targets and timeframes. We welcome the more frank and open assessment in the Critical Minerals Refresh of the challenges the UK faces in competing for critical minerals, but the Refresh still lacks the detail and prioritisation needed to be implementable.** (Paragraph 24)

Partially agree.

The security of supply of critical minerals is a multifaceted issue affecting a wide range of stakeholders, with implications for industrial policy, science and technology, geopolitics, international trade, the circular economy, environmental and social issues, financial markets and data and transparency. These aspects are interlinked and cannot be tackled in isolation. The Critical Minerals Strategy provides an overarching framework for government's approach to critical minerals, and the Refresh highlights 10 key policy objectives that the UK is seeking to implement. Government is using this framework to deliver a wide range of activities that contribute to the Strategy's objectives–securing the supply of critical minerals and improving the resilience of their global supply chains.

Work against this delivery plan is ongoing and includes scoping further policy interventions. As committed to in the Refresh, the Department for Business and Trade (DBT) will be publishing a further update on implementation progress during 2024. This will provide further detail on work that has taken place since the last update and on the outlook for policy implementation.

4. **The Critical Minerals Strategy does not convey the sense of urgency and need for immediate, decisive action which is of paramount importance if the UK is to deliver on its net zero commitments and enhance its long-term economic resilience in the face of mounting challenges.** (Paragraph 27)

Disagree.

As highlighted in response to the Committee's first recommendation above, the UK has been working on critical minerals for over a decade.

Through the Critical Minerals Strategy, the Government recognise the risks faced in critical mineral supply chains. The Minister for Industry and Economic Security at DBT led a Refresh of this strategy in 2023, showing that government is responding and adapting its approach to a rapidly evolving global landscape. Critical mineral supply chains are also considered in the recently published Advanced Manufacturing Plan, Battery Strategy and Critical Imports & Supply Chains Strategy, which are all taking action to promote our resilience in these supply chains. Commitments to new international partnerships and action taken domestically, such as recent investments in critical mineral projects and support for innovation, reflect the seriousness with which the UK is treating this issue, in support of its net zero commitments and long-term economic resilience.

As committed to in the Refresh, DBT will be publishing a further update on implementation of the Critical Minerals Strategy during 2024.

5. **While the UK's allies make substantial progress on implementing their strategies, the UK Government has yet to define its most urgent priorities and push industry to deliver them. There remains a disconnect between strategy and delivery because the priorities set out in the Critical Minerals Strategy do not make clear the UK's role in the critical minerals value chain. The Government should define that role, tying the aims of the Strategy to a wider strategy for industrial and economic resilience.** (Paragraph 30)

Disagree.

The Critical Minerals Strategy and Refresh recognise the UK's strengths: the UK is home to a strong mining and engineering sector, world-leading R&D, mining finance, and pockets of mineral wealth. We have mining and mineral processing expertise, including various industrial clusters and Europe's leading mining school. The City of London is a global centre of mining finance, standards, and metals trading. The UK also has a role as an international dealmaker, leveraging our expertise in regulatory diplomacy, our extensive engagement in multilateral forums and our strong relationships with mineral-rich producer countries and consumer markets. The Strategy seeks to capitalise on these strengths.

Industry engagement was a particular focal point of the Critical Minerals Refresh, in which the Minister for Industry and Economic Security at DBT launched the Task and Finish Group on Industry Resilience to work with and learn from industry, culminating in insights for action. This report was published in December 2023.

6. **We regret that the Government did not assess the vulnerabilities and dependencies in UK industrial supply chains before producing the Critical Minerals Strategy; the result may have been a more focused and implementable document. *Building on the Strategy and the Refresh, the Government should now publish specific targets for priority sectors. The Government should use the report from the Task & Finish group to update the Critical Minerals Strategy with granular detail on those policy areas that are vulnerable to critical minerals supply disruption.*** (Paragraph 31)

Disagree.

The Government recognises the importance of monitoring and mitigating the risks posed within critical minerals supply chains. This has been integral to Government's approach on critical minerals and has been considered as part of criticality assessments as early as 2011 (when the British Geological Survey was part of the working group behind the report 'Critical Raw Materials for the EU'). More recently, the 2021 'UK criticality assessment of technology critical minerals and metals' included indicators which spoke to UK industry risk, including UK import reliance and UK gross value add (GVA) contribution; and the methods have now been reviewed[1]. There have also been other Government strategies and policies with a critical minerals angle launched since the Critical Minerals Strategy and Refresh, including the Advanced Manufacturing Plan and the Battery Strategy and Semiconductor Strategy.

The Task and Finish Group on Industry Resilience for Critical Minerals was a first-of-its-kind initiative to work with industry sectors to deepen engagement and understanding

1 https://ukcmic.org/downloads/reports/ukcmic-review-and-development-of-the-methodology-and-data-used-to-produce-the-uk-criticality-assessment-of-technology-critical-minerals.pdf

on industries' dependencies and risks. We are considering the Task and Finish Group's findings and will be using it to inform our delivery of the Critical Minerals Strategy. Government will set out its response to that report in Spring 2024. It will also consider policy approaches to promote resilience. Government will continue to work with industries to support resilience and diversification in their supply chains, as reinforced by the recent Critical Imports and Supply Chains Strategy published by DBT, and through the Deputy PM/SoS DBT chaired Economic Security Public-Private Forum.

The Critical Imports and Supply Chains Strategy was published in January 2024 to help UK business build secure and reliable supply chains, including for critical minerals, which are vital to the UK's economic prosperity, national security and the delivery of our essential services. This Strategy aims to equip UK businesses with the tools they need to deal with global supply chain issues–from overcoming bureaucratic barriers to dealing with severe shocks caused by events like the Covid pandemic, Russia's invasion of Ukraine, environmental disasters and more recently attacks in the Red Sea that have threatened a key route for global trade. Furthermore, the DBT-funded Critical Minerals Intelligence Centre is expected to produce a revised criticality assessment in 2024 with an enhanced methodology to assess economic vulnerability and supply risk. The FCDO will also support developing countries to harness their potential and grow exports to the UK, including of critical goods. We will seek to increase developing country exports of critical goods to the UK through strategic prioritisation and greater alignment of our trade and development policies in order to strengthen their economic development and diversify our access to critical commodities and components.

7. **A more detailed implementation plan is needed, that defines a coherent 'Team UK' proposition to leverage the UK's unique strengths in the critical minerals value chain. This would clarify the role that UK diplomats can and should play to support the UK's economic resilience. Without a clear steer from Government, the UK risks a scattergun approach to 'de-risking' from industry, as well as ineffective use of the UK's diplomatic leverage.** (Paragraph 35)

Partially agree.

UK Heads of Mission receive regular updates on the Government's critical minerals policy, including direct engagement from FCDO ministers. All Heads of Mission are aware of the priority the Government attaches to delivering the UK's critical minerals strategy, with a direction that they should leverage our diplomatic, trading and development relationships to support the building of resilient, sustainable, and diverse global supply chains.

A governance mechanism has been developed across Whitehall departments to coordinate activity on critical minerals, drawing on each Department to identify UK strengths and present a clear and practical demonstration on what the UK can offer international partners. The Critical Minerals Refresh set out progress to date on the delivery of the commitments against the pillars of the Critical Minerals Strategy, including future milestones.

Delivery is ongoing and coordinated across Departments through a Critical Mineral Resilience governance board at a senior official level.

As outlined in response to the Committee's fifth recommendation the UK has specific strengths that the FCDO draws upon when negotiating bilateral critical mineral agreements. The UK also has a role as an international dealmaker, leveraging our expertise in regulatory diplomacy, our extensive engagement in multilateral forums and our strong relationships with mineral-rich producer countries and consumer markets.

Finally, government is developing a 'UK Proposition' to communicate its strengths, ambitions and offer to international partners. This will help overseas posts to engage our partners, build the case for resilient supply chains and support British businesses. This proposition is being informed by the Critical Minerals Expert Committee.

8. **There is a balance to strike between insisting on due diligence and protecting livelihoods. We urge the FCDO to continue to press for increased transparency but to consider where it could offer financial support or capacity building support to help countries to meet those higher standards.** (Paragraph 40)

Agree.

The Committee correctly sets out that there is a delicate balance between promoting Environmental, Social and Governance (ESG) standards and imposing standards that certain jurisdictions do not yet have the capacity and/or resources to meet. Our international approach has consistently focussed on ensuring critical mineral mining and processing being carried out to the highest ESG standards as possible. The promotion of high ESG standards is embedded into each of our bilateral agreements.

Our partner countries, many of which are developing economies, want to capture more economic value from critical mineral supply chains, including from activities beyond mineral extraction. The recently published International Development White Paper sets out a commitment for HMG to explore how its development tools can further support the diverse, responsible, and transparent critical mineral supply chains vital for a sustainable future. For example, by blending ODA and non-ODA funds we have been able to consider both the UK interests and those of our partner countries at the same time, marrying UK expertise with inclusive economic development.

We are playing a leading role in international fora–such as the G7 and as a founding member of the Sustainable Critical Minerals Alliance - in pushing for the highest possible standards in the critical minerals extraction and processing industries. This has included working with the City of London–whose role as a global centre of mining finance and metals trading–means they are well placed to help make international markets more responsive, transparent, and responsible. We are committed to promoting responsible business practice to reduce and prevent conflict and to protect human rights. We work through a number of international mechanisms to deliver on this, including supporting the OECD's Due Diligence Guidance for Responsible Mineral Supply Chains which enables businesses to operate responsibly from conflict affected and high-risk areas.

Initiatives are underway across Government and industry to contribute to the delivery of the Critical Minerals Strategy's commitments on supporting data and transparency as well as boosting ESG performance. The Committee references one of these data transparency initiatives–a trial Critical Minerals Market Information System (CriMMIS)–to improve data standards and transparency of critical minerals markets information globally. Government is currently considering further steps with this idea, taking account of lessons learned from existing global commodities markets information systems.

Government is also supporting the UK's National Institute for Circular Economy Research (NICER) programme which has shown its potential to become a UN International Centre of Excellence in Sustainable Resource Management. Such a Centre of Excellence could help to mitigate risks to global critical mineral supply by supporting the adaptation of the UN Sustainable Resource Management System (UNRMS), which aligns with the UN Sustainable Development Goals.

9. **We welcome the UK's participation in the Minerals Security Partnership, and its mission to provide a platform for funding a joined-up network of global supply chains that commit to the highest environmental, social and governance (ESG) standards. The UK can make a significant contribution to MSP investment by leveraging UK green investment finance. The Government should take advantage of the current global focus on critical minerals to show leadership in setting the standards for future responsible mining.** ***We encourage the Government to push for the more widespread adoption globally of a recognised 'minimum standard' and be vocal in its support for the highest ESG standards throughout the value chain.*** (Paragraph 44)

Agree.

We welcome the Committee's support for our approach to put the implementation of the highest levels of ESG standards at the heart of our international engagement. These standards should apply to everyone, and we believe that, increasingly, consumers will place a premium of critical minerals that have been extracted and processed to the highest standards possible.

We believe that high ESG standards can lead to value creation and levelling the playing field for responsible businesses by reducing costs, increasing employee productivity, minimising regulatory and legal interventions, facilitating top-line growth, and optimising investment and capital expenditures. Boosting ESG standards also improves the resilience of supply chains, helping to reduce supply chain disruption and our vulnerability to future geopolitical shocks.

The UK has a track record of leading key industry standards such as Extractive Industries Transparency Initiative and the Ethical Trade Initiative that has aimed to improve how the industries operate in relation to ethical, social and governance standards. We will continue to work with governments, standard bodies and industry to shape an effective and transparent global rules-based system.

All seven of our critical mineral agreements signed to date include strong commitments on ESG standards. Through the British Standards Institution, the UK is also actively engaged in International Organisation for Standardisation (ISO) work on critical minerals standards at the global level.

The City of London is a global centre of mining finance, standards, and metals trading, and HMG is working closely with financial institutions to raise awareness of the importance of critical minerals for the energy transition, build understanding of the particular challenges around ESG standards and transparency, and encourage the industry to support the uplift in investment into critical minerals that will be needed.

The UK is a founding member of the European Partnership for Responsible Minerals (EPRM), established as an official accompanying measure to the EU Conflict Mineral

Regulation. This multi-stakeholder initiative aims to increase the proportion of responsibly sourced minerals by working across the whole of the supply chain. The UK Government funded EPRM projects in the Africa Great Lakes region and supported the development of a Due Diligence Hub that provides information for business to progress their supply chain due diligence.

As set out in the UK Critical Minerals Strategy, in advance of the upcoming consultation on the UK's Green Taxonomy, Government has been exploring how the importance of critical minerals to renewable energy technologies could be reflected in the taxonomy. The taxonomy can prove an important tool in enabling the supply of relevant and reliable sustainability information into the market, helping increase financing of activities for the transition to net zero and meet our environmental objectives. It can also support efforts to counter greenwashing and improve market integrity.

10. **The Government should approach countries as active participants making decisions in their own national interests, rather than passive recipients of Chinese or western investment, and offer them an attractive alternative based on the UK's unique offer, as set out in the previous chapter.** (Paragraph 49)

Agree.

A central element of our international engagement has been focussed on helping like-minded, resource-rich countries develop critical mineral resources in a market-led way that aligns with sustainability, transparency, human rights and environmental goals. We believe it is essential that we support, development priorities, particularly in relation to those countries moving along the critical minerals value chain. The Growth Gateway programme, part of the FCDO's British Investment Partnerships Directorate (BIPD), has committed to provide £2m to the World Bank's Resilient and Inclusive Supply-chain Enhancement (RISE) initiative which will help developing countries increase manufacturing of clean-energy products and boost their participation in the minerals industry leading to quality local jobs and economic growth. RISE aims to address concerns about diversification of clean energy products' supply chains by providing opportunities of mutually beneficial cooperation between low- and middle-income countries wishing to play bigger roles in the midstream and downstream segments of these supply chains; and G7 members and other developed countries willing to provide finance and knowledge, with the World Bank Group playing a catalytic role.

We have been clear that the energy transition must support the needs of developing countries, including those who have critical mineral resources in the ground and want to use them to support economic development. We have also been vocal in stating that critical mineral activities must be carried out to the highest environmental, social and governance standards.

The UK-hosted Minerals Security Partnership meeting in October 2023 invited select resource-rich countries to share their experiences and priorities, while our agreements with producer countries–including Kazakhstan and Zambia–support those countries' economic development, as well as helping to secure global clean energy supply chains.

The UK is stepping up its support to help African countries build businesses in the critical minerals supply chain. We launched a £900,000 ODA-funded project in October 2023 to identify bankable opportunities in mineral processing, and once initial research has concluded we will provide technical assistance to support partner countries secure investment. In addition, the Manufacturing Africa programme works with companies to help them seek investment, with a particular focus on green manufacturing. So far, this programme has supported 28 closed deals which have attracted investment of over £314m into Africa. Future activities may focus on scaling up work around downstream manufacturing potential in critical minerals supply chains.

Government is keen to leverage our strengths through our trade promotion activities, capacity building, knowledge transfer and technical assistance - to continue to build international partnerships and help UK organisations participate in developing resilient, diverse and responsible global supply chains of critical minerals for the future.

11. **For the UK's bilateral agreements to effectively create a secure end-to-end supply chain for critical minerals, the FCDO needs to pursue a strategic approach that considers the Government's domestic priorities, its geopolitical interests and the need to preserve relationships with countries forming important links in the value chain.** ***We recommend that, following the Task & Finish Group's report, the Government assess the strategic vulnerabilities it reports in the UK's critical minerals supply chains and map those to a diplomatic agenda to develop bilateral relationships that will best support the UK's economic and security resilience.*** (Paragraph 50)

Agree.

The UK's bilateral approach is already guided by an internal International Engagement Plan that seeks to support the delivery of the Critical Minerals Strategy. Opportunities for international engagement are considered across government departments ensuring domestic as well as broader HMG priorities from foreign policy to economic security are considered. Alongside our bilateral engagements and agreements, we work closely through the G7 and Minerals Security Partnership to ensure that we are collaborating with close partners to ensure the resilience and security of critical mineral supply chains.

We welcome the Task & Finish Group's report and will work closely with the Department of Business and Trade to review the report's recommendations. The Government's response to the Task & Finish Group's report will detail how its findings will inform our delivery of the Critical Minerals Strategy, including on international collaboration.

12. **We are disappointed that the Minister could not articulate the decision-making process behind the UK's bilateral partnerships on critical minerals, although we appreciate that efforts are being made to coordinate such partnerships with allies.** (Paragraph 51)

Disagree.

We do not accept the premise of the Committee's assertion that the Minister was unable to articulate the decision-making process behind the UK's bilateral partnerships on critical minerals. The Minister was not asked to articulate the decision-making process.

The approach to developing the UK's bilateral partnerships on critical minerals has been consistently based on the priorities identified in the Critical Minerals Strategy. As part of the ongoing delivery of the critical minerals strategy we have developed an internal assessment of which countries the UK should prioritise for international engagement based on each country's position as: a producer country of critical minerals; its like-minded approach to market-led, transparent and diversified critical mineral supply chains; or a stated desire to work collaboratively with the UK.

Our focus has been on leveraging the UK's international leadership, including as home to some of the world's global mining majors, as a centre of responsible mining finance, metals trading and Environmental, Social and Governance standards.

We have consistently identified opportunities to engage with key countries bilaterally on critical minerals, to promote joint working towards solutions to global issues in critical mineral value chains.

13. **The Government must articulate the ways in which the UK's economic needs for critical minerals and its foreign policy goals interact and what consequent trade-offs might need to be made. It should act as the interface between the public and private sectors and the people of this country, drawing conversations around foreign policy, mining, industry, and climate out of their echo chambers and into wider discourse. We agree with the Prime Minister that an honest public conversation about the way the UK reaches its net zero targets and secures economic resilience, including the trade-offs around mining, is crucial.** (Paragraph 56)

Agree.

We agree with the Committee's conclusion that Government plays a key role in aligning the UK's economic needs and its foreign policy goals, while balancing this with any trade-offs that need to be made. The Government shares the committee's commitment to transparency and honesty in conversation with our stakeholders and the public on the critical mineral requirements for meeting net zero, and the importance of safeguarding our economic security.