



December 2024



**NEED
TO
KNOW**

Need to Know is an unclassified open-source, multi-platform media collation, produced by **CSIS Academic Outreach & Stakeholder Engagement**, on issues considered relevant to Canada's broad national security interests. The objective is to highlight and share a diverse array of perspectives on Canadian and global security matters, with a focus on emerging developments and sources of expertise across disciplines. Inclusion of a document, source, expert or event does not constitute endorsement by, or affiliation with, CSIS.

The Geopolitics of Clean Energy: A Focus on Lithium

The Security–Sustainability Nexus: Lithium Onshoring in the Global North

– In this article, the author examines the political economy of lithium and emphasizes two major developments. First, the onshoring of lithium mining by Global North governments to enhance supply chain security; and second, a clear commitment to sustainable sourcing. The author theorizes these trends within a “security–sustainability nexus” that aligns state and corporate interests. However, this alignment reveals contradictions in green capitalism and the persistent inequalities within extractive industries amid the energy transition, *Global Environmental Politics*. Read [the article](#).

Washington Wants a White Gold Rush – The Biden administration, through the Inflation Reduction Act and significant domestic investments, aims to reduce dependency on China for lithium—a critical mineral for US green technologies. Efforts include incentivizing new projects, particularly in Nevada, though the author notes that challenges remain, such as environmental concerns, labor shortages, permitting issues, and volatile lithium prices, *Foreign Policy*. Read [the article](#).

Steps Forward to Strengthen the Lithium-Ion Battery Supply Chain – In this article, the author puts into perspective the Biden administration's approach to reshoring and reducing supply chain risks as part of the green energy transition. The author argues that local content requirements within the Inflation Reduction Act (IRA) hinder electric vehicle demand by limiting access to critical minerals and manufacturing options, Read [the article](#).

Podcasts of Note



Canadian Global Affairs Institute Podcast Network

On this episode of the Energy Security Cubed Podcast, Kelly Ogle and Joe Calnan interview Chris Doornbos about direct lithium extraction and what it could mean for making a secure North American battery supply chain.



The Big Switch Podcast

This episode of the Big Switch podcast *Why it Matters* dives into the stakes of the battery-based energy transition.



Driving Change: How are EVs reshaping China’s economic relationship with Latin America? – This brief examines China’s increasing dominance in Latin America’s EV supply chain, fueled by substantial investments in lithium, copper, refining, and vehicle assembly. Chinese engagement is bolstering its EV industry while reshaping Latin America’s economy and environmental landscape, raising questions about the region’s economic advancement and sustainability, *Council on Foreign Relations*. Read and watch [the presentation](#).

What US tariffs on Chinese batteries mean for decarbonization—and Taiwan – In this policy brief, the author urges a balanced U.S. approach to Chinese-made batteries, advocating for cooperation with allies to address security risks without compromising decarbonization goals. Recommendations include diversifying supply chains, particularly for critical materials, enhancing grid resilience, and expanding U.S. battery manufacturing and infrastructure to reduce reliance on China, *Atlantic Council*. Read [the article](#).

See also: **Does the new EU-Serbia lithium deal undermine democracy? A Debrief with Ivan Vejvoda**, *Atlantic Council*, Watch [the video](#); **Bolivia’s new government: many challenges, one big opportunity**, *International Institute for Strategic Studies*, Read [the article](#).

Upcoming Events



David vs. Goliath: Democracy and Autocracy in the Russo-Ukrainian War

Munk School of Global Affairs

Event in Toronto, Ontario

Click [here](#) for more information.

2 December, 2024
16:00 – 18:00 EST

CDSN Year Ahead 2025: Writing Canada’s Foreign Policy

Canadian Defence and Security Network

Event in Ottawa, Ontario

Click [here](#) for more information.

10 December, 2024
08:30 – 17:00 EST

Powering the Commanding Heights: Towards an American Strategy For Electric Demand Growth

Center for Security and Intelligence Studies

Event in Washington, D.C. [webcast available]

Click [here](#) for more information.

11 December, 2024
09:00 EST

Diversions



Curious to know what Santa is up to today? Check out the North American Aerospace Defense Command’s [Santa Tracker](#) for all the latest information on Santa’s whereabouts.

While you’re on the web, take some time to read about different Holiday customs from around the world. Check it out [here](#).

Feedback



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