



An initiative of the European Union

EUCLUSTERS



TALKS ★

On the way to sustainability: Raw Materials & Circular Economy

5 April 2023

online

08:30-09:45 CET

#SingleMarket30



EUROPEAN CLUSTER
COLLABORATION PLATFORM

Agenda

1. News from the European Cluster Collaboration Platform: Outcomes of the Clusters meet Regions on EU-Ukrainian Business Partnerships
Marek Przeor, *Team Leader – Cluster Policy, DG GROW, European Commission*
2. Critical Raw Materials Act
George Mörsdorf, *Policy Officer - Energy Intensive Industries and Raw Materials, DG GROW, European Commission*
3. Panel debate
David Fitzsimons, *Director, Remanufacture Council*
Emmanuel Katrakis, *Secretary General, European Recycling Industries' Confederation*
Sari Tasa, *Senior Specialist, Finnish Ministry of Economic Affairs and Employment*
Wolfgang Reimer, *Managing Director, Geo Competence Centre Freiberg*
4. Funding opportunities

Housekeeping rules

Jennifer Baker, presenter

- Please use the **Q&A function to ask questions**, and the **chat function** to comment or share links
- We invite you to **join the debate**: Please **raise your hand** and we will give you the floor.
- Please **unmute yourself** and **activate your camera** when you take the floor.
- Please note that the session is being **recorded**.

NEWS FROM THE EUROPEAN CLUSTER COLLABORATION PLATFORM





- *Collaboration is our future and future is collaboration*
Prime Minister of Slovakia - Eduard Heger
- *Reconstruction of UA will be a huge task of 21st century*
Prime Minister of Ukraine - Denys Shmyhal
- UA is the EU candidate country: UA clusters/companies to be quickly integrated into EU value chains
- The best help for Ukraine is to do business with Ukraine
- Joint Statements for collaboration signed between Ukrainian Cluster Alliance and national cluster associations from Slovak Republic, Czech Republic, Lithuania, Poland and Romania

George Mörsdorf

Policy Officer – Energy-, DG GROW

European Commission

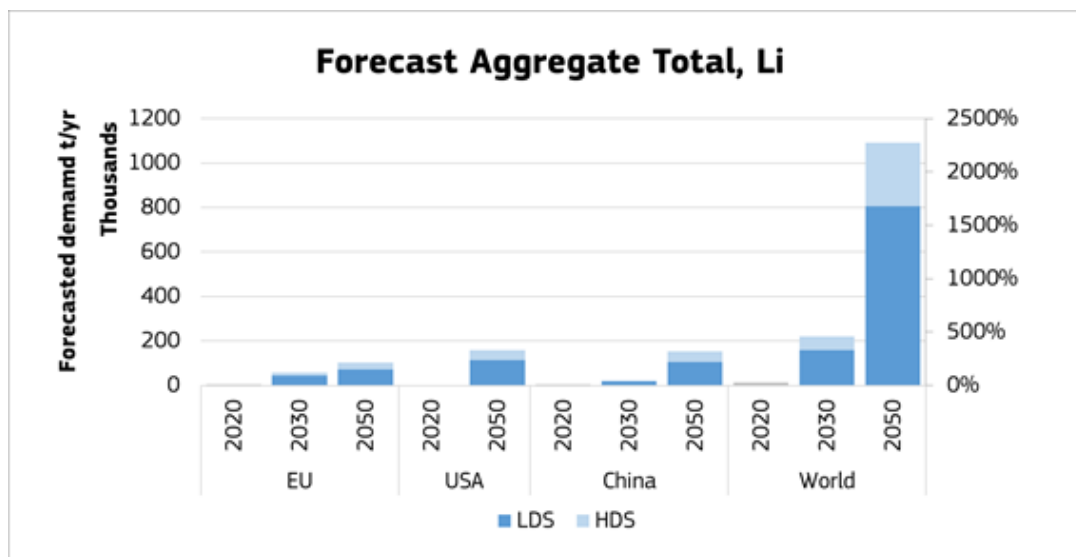


European CRM Act

Proposal for a Regulation - establishing a framework for ensuring a secure and sustainable supply of critical raw materials

Critical raw materials (CRMs) and the EU economy

- Driven by the **twin transition** and defence needs, significant **growth in CRM demand**, with risk of global supply/demand imbalance



Demand forecasts aggregated for lithium (2023 Foresight Report)

Lithium demand for batteries in the EU is expected to **grow by 12 times by 2030** and **by 21 times by 2050**.

- EU is heavily dependent on third country supply for CRMs that are key for strategic technologies
- Strategic dependencies and risk of supply chain disruption

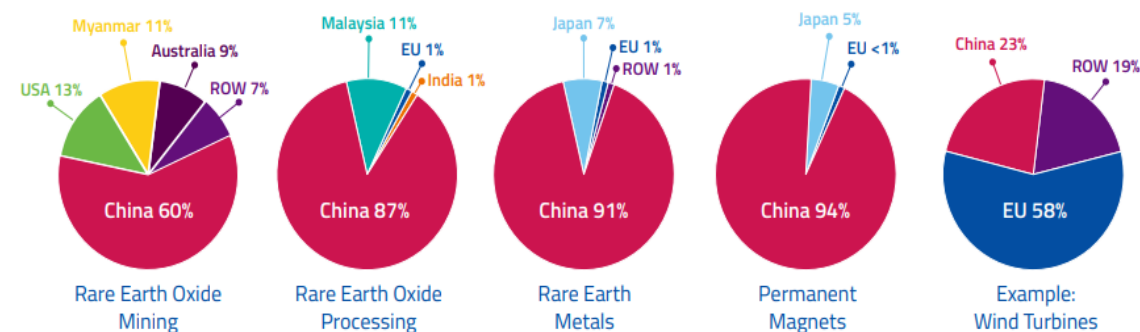


Fig. 3: From rare earths mining to wind turbine manufacturing: estimated market shares in 2019. Sources: Team analysis and Roskill 2018; Adamas Intelligence 2019; Peteves 2017; Carrara et al. 2020; IEA 2021; USGS 2021.

Source: European Raw Materials Alliance (ERMA)

European Critical Raw Materials Act

Ensuring a secure and sustainable supply
of critical raw materials for the Union



Strengthen all stages of the
European CRM value chain

Improve EU capacity to monitor
and mitigate risks of disruption to
CRM supply



Diversify EU CRM imports to reduce
strategic dependencies

Improve CRM circularity
and sustainability



I. Setting Priorities

Defining critical and strategic raw materials

CRM

Whole EU economy, based on :

- supply risk
- economic importance

SRM

SRM are a subset of CRM:

- Key for strategic technologies (green, digital, defence and space)
- Forecast demand risks outstripping supply

2030 benchmarks

Towards more SRM supply security

- EU's **extraction** capacity cover at least **10%** of the EU's SRM consumption
- EU's **processing** capacity cover at least **40%** of the EU's SRM consumption
- EU's **recycling** capacity cover at least **15%** of the EU's SRM consumption

Towards more diversification of supply

- Not more than **65%** of EU consumption of each SRM should come from a single third country.

Critical raw materials

34 raw materials defined as critical by their high

- Economic importance
- Supply risk

... based on a regular assessment of available data in an established [methodology](#)

- Antimony
- Arsenic
- Bauxite
- Baryte
- Beryllium
- **Bismuth**
- **Boron**
- **Cobalt**
- Coking Coal
- **Copper**
- Feldspar
- Fluorspar

- **Gallium**
- **Germanium**
- Hafnium
- Helium
- **Heavy Rare Earth Elements**
- **Light Rare Earth Elements**
- **Lithium**
- **Magnesium**
- **Manganese**
- **Natural Graphite**
- **Nickel – battery grade**
- Niobium

- Phosphate rock
- Phosphorus
- **Platinum Group Metals**
- Scandium
- **Silicon metal**
- Strontium
- Tantalum
- **Titanium metal**
- **Tungsten**
- Vanadium

Note: A subset of the CRMs are classified as „**strategic raw materials**“ due to their use in strategic technologies and strong projected demand growth. Certain measures under the CRMA apply only to them.

II. Strengthening the value chain

Strategic Projects

Across the whole SRM value chain: extraction – processing – recycling

Selected by the Commission with advice from the Board based on

- Contribution to security of supply
- Sustainability
- Technical feasibility
- Cross-border benefits in EU/ Economic and social benefits in third countries

Benefits

- **Priority Status** in national and EU law: for administrative and judicial procedures
- **One-stop-shop approach**
- **Permitting - Legal time-frames**
 - Extraction: 24 months
 - Processing & Recycling: 12 months
- Provisions to facilitate and timely deliver **environmental assessments and authorisations without weakening environmental and social protection**
- **Enabling conditions to implement Strategic Projects**
 - The Critical Raw Materials Board provides coordination and advice to secure remaining financing
 - Provisions to facilitate the conclusion of off-take agreements

One-stop-shops

Member States shall designate one national authority to facilitate and coordinate the permit-granting process

Exploration

Member States shall draw and implement national exploration programmes targeting CRMs

III. Risk monitoring and mitigation

- Monitor **supply risks** of CRM
- **Stress tests** by the Commission with Member States
- Alerts to MS/relevant authorities in case of risk
- **Company risk preparedness**
- **Strategic stockpiling**: information gathering and coordination
- Voluntary joint purchasing

IV. Ensuring the free movement of CRMs with a high level of environmental protection

CIRCULARITY

National measures on CRMs circularity

Maximising potential from (closed) **extractive waste facilities**

Preparing the ground for massive recycling of **permanent magnets**

SUSTAINABLE CHOICES

Recognition of **certification schemes** on the sustainability of CRMs

Empowerment to set, at a later stage, information requirements on **the environmental footprint** of CRMs placed in the EU market

Governance

CRITICAL RAW MATERIALS BOARD

The Board has an **advisory role** supporting the Commission in the implementation of the different actions proposed in the Act.

COMPOSITION

Chaired by the European Commission

Composed by Member States and the Commission

Representatives from the EP as observers

STRATEGIC PARTNERSHIPS

The Board also discusses **Strategic Partnerships** of the Union with third countries that cover raw materials and ensures their coordination with other international fora and initiatives.

Links

- [CRM Act Press Release](#)
- [CRM Act \(Draft Regulation\)](#)
- [CRM Act \(Communication\)](#)
- [2023 JRC Foresight Study](#)
- [2023 Study on CRMs for the EU](#)
- [CRM Factsheets](#)

Panel debate

David Fitzsimons, Director, Remanufacture Council

Emmanuel Katrakis, Secretary General, European Recycling Industries' Confederation

Sari Tasa, Senior Specialist, Finnish Ministry of Economic Affairs and Employment

Wolfgang Reimer, Managing Director, Geo Competence Centre Freiberg

What are your thoughts?

FUNDING OPPORTUNITIES

Recycling technologies for critical raw materials from EoL products

- Projects are expected to contribute to the following outcomes:
 - Develop **raw materials recycling and re-use of components and/or products** from end-of-life products technologies and urban mines, including efficient sorting technologies for separation and recycling and the sustainable embedment of the process regarding energy, resource and water efficiency
 - Improve **responsible supply of raw materials** to Europe in line with the EU principles for sustainable raw materials, which are a non-regulatory set of principles based on the EU acquis. They set out requirements for sustainable raw materials and extraction and processing in Europe in terms of social, environmental and economic performance
 - Demonstrate contribution to **EU climate neutrality objectives**
- Deadline: 20 April 2023
- HORIZON-IA HORIZON Innovation Actions; TOPIC ID: HORIZON-CL4-2023-RESILIENCE-01-05
- Published on [Funding & Tenders Portal](#)

Technologies for processing and refining of critical raw materials

- Projects are expected to contribute to the following outcomes:
 - Increase **recovery rates** of valuable raw materials, particularly critical raw materials from low grade or complex ores and/or from extractive waste;
 - Significantly **increase economic performance** in terms of higher material-, water-, energy- and cost-efficiency and flexibility in minerals processing and metallurgical processes;
 - Significantly **improve the health, safety and environmental performance of the operations** throughout the whole life cycle which is considered, including a reduction in waste, wastewater and emissions generation and a better recovery of resources from generated waste;
 - Improve **responsible supply** of raw materials to Europe in line with the EU principles for sustainable raw materials, which are a non-regulatory set of principles based on the EU acquis. They set out requirements for sustainable raw materials and extraction and processing in Europe in terms of social, environmental and economic performance.
- Deadline: 20 April 2023
- HORIZON-IA HORIZON Innovation Actions; TOPIC ID: HORIZON-CL4-2023-RESILIENCE-01-03
- Published on [Funding & Tenders Portal](#)

Innovative technologies for sustainable and decarbonised extraction

- Projects are expected to contribute to the following outcomes:
 - Develop **innovative technologies** for extraction of raw materials in the European Union.
 - Increase **the domestic EU sourcing** of raw materials.
 - Improve **responsible supply** of raw materials to Europe in line with the EU principles for sustainable raw materials, which are a non-regulatory set of principles based on the EU acquis. They set out requirements for sustainable raw materials and extraction and processing in Europe in terms of social, environmental and economic performance.
 - Show the potential to **reduce substantially the Green House Gases (GHGs) emissions** intensity of extraction per ton of the material (metal, metal content, concentrate, mineral) sold on to the downstream value chain, thus contributing to EU climate neutrality objectives.
 - Accelerate development of **EU domestic raw materials exploration projects** integrating innovative technologies
- Deadline: 20 April 2023
- HORIZON-IA HORIZON Innovation Actions; TOPIC ID: HORIZON-CL4-2023-RESILIENCE-01-02
- Published on [Funding & Tenders Portal](#)

New processes for upcoming recycling feeds (Batt4EU Partnership)

- Projects are expected to contribute to the following outcomes:
 - A European economic base which is stronger, more resilient, competitive and fit for the green and digital transitions, by **reducing strategic dependencies** for critical raw materials by promoting a circular economy
 - The development of **recycling technologies** targeting upcoming recycling feeds and producing high quality precursors, semi-products and battery materials enabling their use in the battery production and other production processes
 - Achievement of the **recycling efficiency and material recovery targets** as described in the proposed Batteries Regulation by industries, especially for low metal and low material value components
 - **Recycling chains** with a cost-effective process in comparison with primary materials
 - Safeguarding of the sustainability, low CO2 footprint, low chemicals usage and minimal emissions of newly developed recycling processes
- Deadline: 18 April 2023
- HORIZON-IA HORIZON Innovation Actions; TOPIC ID: HORIZON-CL5-2023-D2-01-02
- Published on [Funding & Tenders Portal](#)



Opportunities for SMEs: Calls from Euroclusters

- B-Resilient: Building the biomass resilience of **food producing and processing SMEs** through green and digitalised value chains, financial support for participation in **brokerage event**; deadline 24 April 2023
- CirclnWater: Financial support for SMEs to develop new products, services, or methods, addressing the **water** challenges in **agri-food and energy-intensive industries**; deadline 31 May 2023
- CREATHRIV-EU: Financial support for SMEs from **Creative and Cultural Industries** for diversification of products/service/contents, green transition, internationalisation, and skills; deadline 2 May 2023
- DREAM: Financial support for integration and use of **digital technologies into manufacturing environments**; deadline 25 May 2023
- EPICENTRE: Programme of accompaniment, acceleration, validation, and transfer to the market innovative solutions between SMEs from **ICT, fintech, health and agri-food** and mid-cap and big companies; deadline 29 May 2023
- EuroBoostEX: Call for **innovation** services for SMEs from the **textile** ecosystem; deadline 7 June 2023
- IKAT: Tourism Call for SMEs in Europe for financial support for **services** (business model, acceleration, open innovation, internationalisation, training, etc.); deadline 20 April 2023
- **All calls here:** <https://clustercollaboration.eu/open-calls>



Opportunities for SMEs: Calls from Euroclusters

- METASTARS: Development of more digital or greener **innovation products** or services or high-risk innovation products or services in the **Aerospace and Defence** value chain; deadline 6 June 2023
- PIMAP4Sustainability: Financially support **photonics, advanced materials and advanced manufacturing** SMEs to develop innovative projects in aerospace, metal working, and industrial production; deadline 3 May 2023
- RE-CENTRE: Financial support for SMEs from **furniture and living sector, IT sector, and green/circular economy** sector in the development of **innovation** projects and new business models; deadline 27 June 2023
- Silicon Eurocluster: Call for **demonstration** projects of **microelectronics** systems; deadline 31 May 2023
- SocialTech4EU: Call for **Social Enterprises** in Europe for financial support for **training**; deadline 12 April 2023
- SUAVE: Financial support for SMEs from **European Urban Agriculture** for diversification of products/service, green transition, skills, internationalisation; deadline 30 May 2023
- xBUILD-EU: Financial support for **new-to-firm products/services, green and digital transition, and internationalisation**; deadline 7 June 2023
- **All calls here: <https://clustercollaboration.eu/open-calls>**

EU-Ukrainian Cooperation

- **DG REGIO, INTERREG:** Funding for investments and interregional collaboration
 - Cross-border, transnational, and mainstream national and regional programmes
 - Overview in Database: www.keep.eu / Application on www.interreg.eu
- **DG GROW, Single Market Programme:**
 - [Business Bridge](#): to facilitate the access of Ukrainian SMEs to the EU Single Market
 - [Erasmus for Young Entrepreneurs-Ukraine](#): Opportunity for aspiring entrepreneurs to learn the skills necessary to start and/or successfully run a small business
- **DG RTD, [Funding for Research and Innovation](#):**
 - Key Instrument for **Research Infrastructure and Higher Education Institutions**
 - EIC4Ukraine: Pan-European Network by the Innovation Council, for Deep Tech Companies in Ukraine
 - “Associating Ukrainian Cities to the Climate-Neutral and Smart Cities” Mission
- **GIZ + DG Near, Funding for SME Competitiveness**
 - [EU4Business](#) supports around 30 unique clusters in increasing resilience, grow, export and innovate
- **EIT Manufacturing**
 - [Funding](#) for the areas of education, innovation and business creation and the Regional Innovation Scheme
- **EIF, [Funding for Investments and interregional collaboration](#)**
 - Loan portfolio guarantees for SMEs in Ukraine
- **IFC, [Financing for the Private Sector](#)**
 - IFC launched a US\$2 billion response package to support the Ukrainian private sector to be deployed over FY23-24

Continue the dialogue...



<https://www.linkedin.com/groups/9274710/>

Register for the next Talks

19 April 2023 Private Financing

3 May 2023 Transition Pathway on Construction

17 May 2023 Transition Pathway on Textiles



PROGRAMME HANNOVER MESSE 2023

#SingleMarket30

- We will highlight 5 flagship topics:
 1. Energy (incl. Net-Zero Industry)
 2. Raw materials
 3. Access to finance
 4. Industrial Alliances
 5. 30 years of the Single Market

20 April:
Session on
Clusters

Free tickets for visitors of the EC stand (clusters are very much welcome):

<https://www.hannovermesse.de/en/application/registration/direct-entry-tickets-passes?code=opLxM>



17-21 April 2023

European Commission Stand:
Hall 12, stand D05



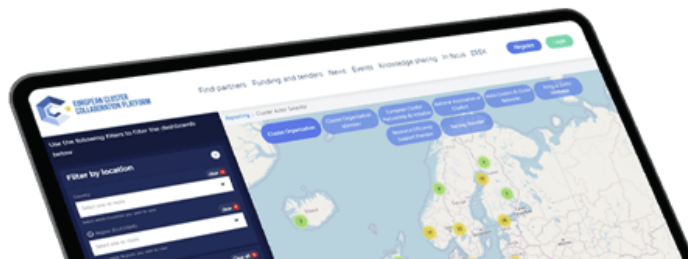
Register on the European Cluster Collaboration Platform!

<https://clustercollaboration.eu/>

Strengthening the European economy through collaboration



The European online hub for industry clusters
Strengthening the European economy through collaboration



Find partners per country, region,
sector or industrial ecosystem

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THANK YOU





EUCLUSTERS TALKS

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