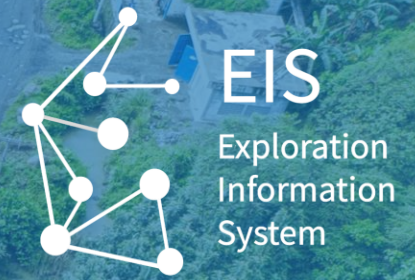


EIS Final Event:

Shaping the Future of Sustainable Mineral Exploration



Funded by
the European Union



Hafsa Munia (GTK)

EIS Coordinator Welcome Message

Welcome by EIS

9:00 – 9:40

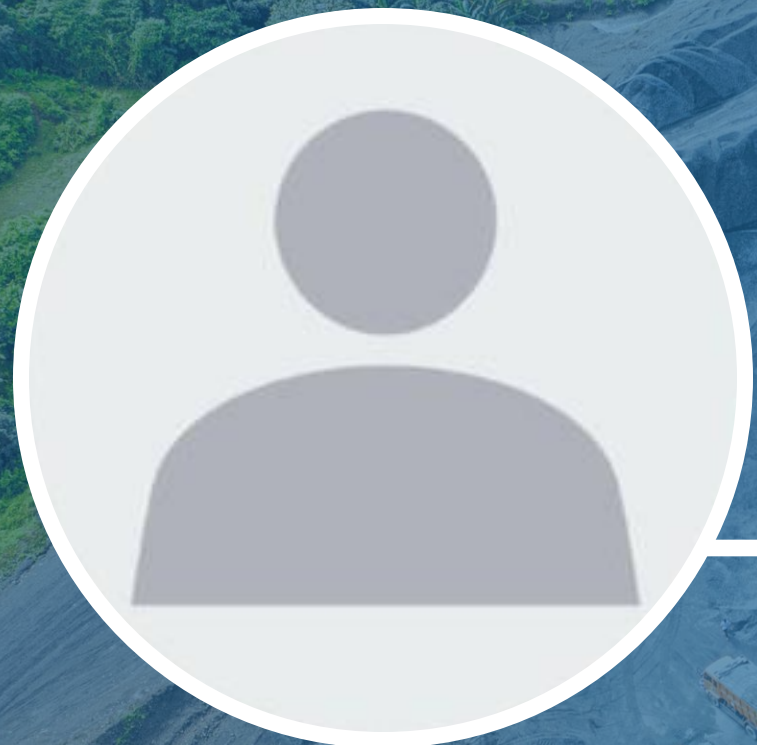
Dimitrios Biliouris (HaDEA)

EIS Project Officers Welcome Message



Welcome by HaDEA

9:00 – 9:40



Daniel Cios (DR GROW)

CRM Overview & Strategic Projects

Welcome by EIS & HaDEA & DG GROW

9:00 – 9:40



European Critical Raw Materials Act (CRMA)

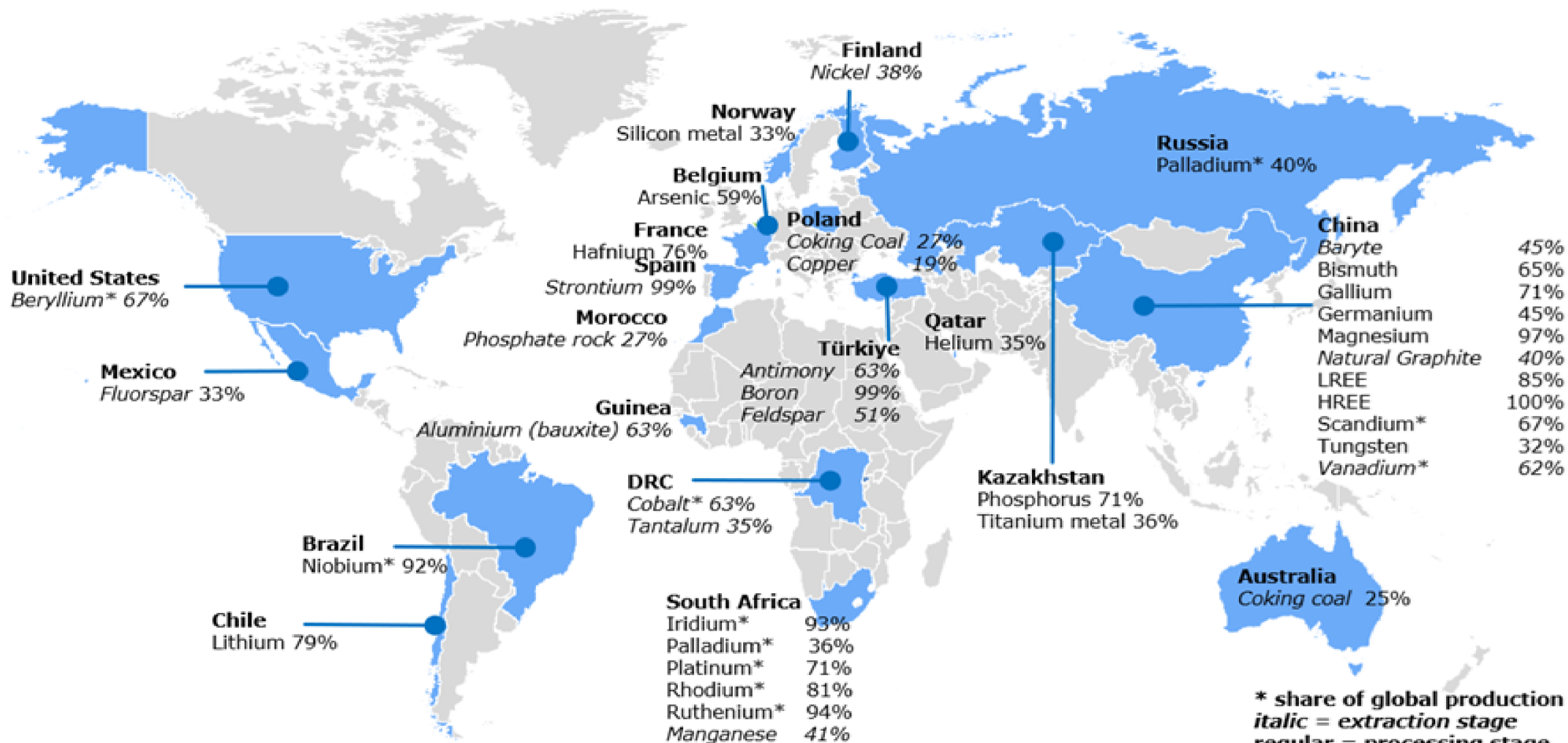
Regulation establishing a framework for ensuring a secure and sustainable supply of critical raw materials

Daniel CIOS

Policy Officer

GROW I.1 – Raw Materials, Energy Intensive Industries

THE EU IS HEAVILY DEPENDENT ON THIRD COUNTRIES FOR SUPPLY OF CRMs



Critical Raw Materials

Note: A subset of the CRMs are classified as „**strategic raw materials**“ (17 in total) due to their use in strategic technologies and strong projected demand growth. Certain measures under the CRMA apply only to them.

34 RAW MATERIALS DEFINED AS CRITICAL BY THEIR HIGH ECONOMIC IMPORTANCE AND SUPPLY RISK

EU Critical Raw Materials, 2023 based on economic importance and supply risk

- Antimony
- Arsenic
- Bauxite
- Baryte
- Beryllium
- Coking Coal
- Feldspar
- Fluorspar
- Hafnium
- Helium
- Niobium
- Phosphate rock
- Phosphorus
- Scandium
- Strontium
- Tantalum
- Vanadium

EU Strategic Raw Materials, used in strategic technologies and strong projected demand growth

- Aluminium
- Bismuth
- Boron
- Copper
- Gallium
- Germanium
- Magnesium
- Silicon metal
- Synthetic Graphite
- Titanium metal
- Tungsten

Battery Raw Materials

- Cobalt
- Nickel
- Natural Graphite
- Manganese
- Lithium

Light Rare Earth Metals

- Cerium
- Lanthanum
- Neodymium
- Praseodymium
- Samarium

Heavy Rare Earth Metals

- Dysprosium
- Erbium
- Europium
- Gadolinium
- Holmium
- Lutetium
- Terbium
- Thulium
- Ytterbium
- Yttrium

Platinum Group Metals

- Iridium
- Palladium
- Platinum
- Rhodium
- Ruthenium

THE CRITICAL RAW MATERIALS ACT AIMS TO ENSURE A SECURE AND SUSTAINABLE SUPPLY OF CRMs

Objectives of the CRMA



Strengthen all stages of the European CRM value chain



Diversify EU CRM imports to reduce strategic dependencies



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



Improve CRM circularity and sustainability



2030 CRMA 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 **25%** 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.

The Critical Raw Materials Act entails multiple elements to achieve its goals

Exploration

Monitoring

Mitigation

Action

- **National exploration programmes**
- Collected data made available for economic operators

- Commission **monitors supply risks** of CRMs
- Commission and Member states perform **stress-test** for each SRM

- Member States are required to **report on their strategic stocks** for SRM
- MS to identify large companies that should **audit their SRM supply chains** every 2 years

Objective

Up-to-date geological information



enables **de-risking of targeted exploration** and extraction projects.

In case of risk of supply disruption, the Commission will issue **alerts to the Member states** or relevant authorities

Adoption of a **benchmark that indicates a safe level** of stocks



The Board can issue opinions to MS to improve strategic stock coordination and stock levels

The Critical Raw Materials Act entails multiple elements to achieve its goals

Action

Circularity

- **national plans on CRMs circularity** and creation of database on all closed facilities of extractive waste
- assess the CRM recovery potential
- **information requirements** on permanent **magnets**

Objective

- Maximising potential from (closed) extraction waste facilities
- Increase reuse, collection and recycling
- Recycling technologies

Sustainability

- Recognition of **certification schemes** on the sustainability of CRMs
- Empowerment to set, at a later stage, information requirements on the **environmental footprint** of CRMs

Ensuring the free **movement of SRMs with a high level of environmental** protection

Financing

- Commission is establishing a **Demand Aggregation platform**:
 1. Spot market mechanism
 2. Offtake mechanism
- Pitching Sessions

Facilitation access to finance

Strategic projects to strengthen value chains

Selection

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

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
- Points of Single Contact in Member States (**SPOC**)
- Permitting - **Legal time-frames**
 - Extraction: 27 months
 - Processing & Recycling: 15 months
- Provisions to facilitate and timely deliver **environmental assessments and authorisations** without weakening environmental and social protection

Strategic Projects for the EU

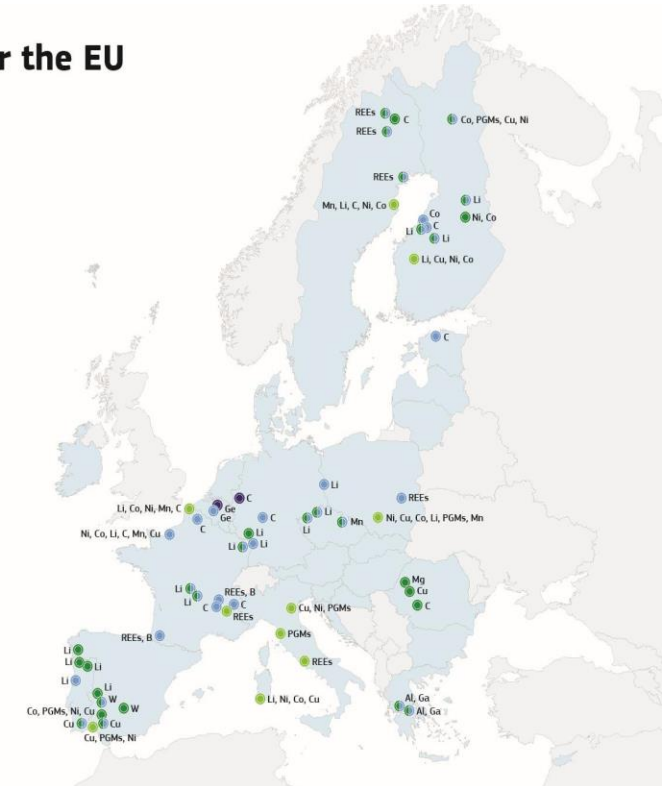
MAP LEGEND



Al	Aluminium
B	Boron
BRMs	Battery Raw Materials ¹
Co	Cobalt
Cu	Copper
Ga	Gallium
Ge	Germanium
C	Graphite
Li	Lithium
Mg	Magnesium
Mn	Manganese
Ni	Nickel
PGMs	Platinum Group Metals
REEs	Rare Earth Elements
W	Tungsten

¹ Battery Raw Materials refer to lithium, cobalt, nickel, manganese and graphite

Disclaimer: The location of projects is based on a regional scale and doesn't reflect their exact geographical locations



In 2021-2025 EUR 630 mln devoted to Raw Materials R&I

Total 2025 Budget EUR 168 mln

Opening: 22 May 2025
Deadline: 23 Sep 2025

- **HORIZON-CL4-INDUSTRY-2025- 01-MATERIALS-61:** Technologies for critical raw materials and strategic raw materials from end-of life products (IA)
- **HORIZON-CL4-INDUSTRY-2025- 01-MATERIALS-62:** Strategic Partnerships for Raw Materials: Innovative Approaches for sustainable production of Critical Raw Materials (IA)
- **HORIZON-CL4-INDUSTRY-2025- 01-MATERIALS-63:** Innovative solutions for the sustainable production for Semiconductor raw materials (IA)
- **HORIZON-CL4-INDUSTRY-2025-01-MATERIALS-64:** EU Co-funded Partnership on raw materials for the green and digital transition (Programme Co-fund action)

What is the next step for the EU's raw materials policy?

Implement the various provisions of CRMA	Support and monitor labelled Strategic Projects	Strengthening our international engagement	Developing the European Critical Raw Materials Centre	Developing an autonomous financial intervention capacity
Taking action on: • Circularity • National programmes • Future calls for strategic projects	By ensuring: • continuous compliance with CRMA criteria • proper implementation by Member States of the provisions on permitting • financial de-risking of strategic projects in collaboration with public and private financial institutions	Acting within the following frameworks: • implementation of the partnerships (and the conclusion of the partnership with South Africa) • G7, to develop a production alliance and a standards- based market • G20, the Minerals Security Partnership, the IEA and the UN, depending on initiatives	With the aim of acting to: • Develop joint purchasing mechanisms, complementing the aggregation platform • Strengthen European strategic stocks • Invest in key projects	Using old and new instruments: • With Horizon Europe; • With the Single Market Programme to support various initiatives (particularly on stocks) • Under the future MFF and the European Competitiveness Fund to support strategic projects and



Thank you

Rolf Kuby (Director General, Euromines)

Keynote



Welcome by EIS & HaDEA & DG GROW

9:00 – 9:40

Critical Raw Materials Act – Securing sustainable supply of CRMs for Europe

EIS Final Event: Shaping the Future of Sustainable Mineral Exploration

Rolf Kuby
Director General, Euromines



350k direct
Employees

54 Metals and
Minerals

41 Members

17 Companies

15 Mining
Federations

9 Associated
members



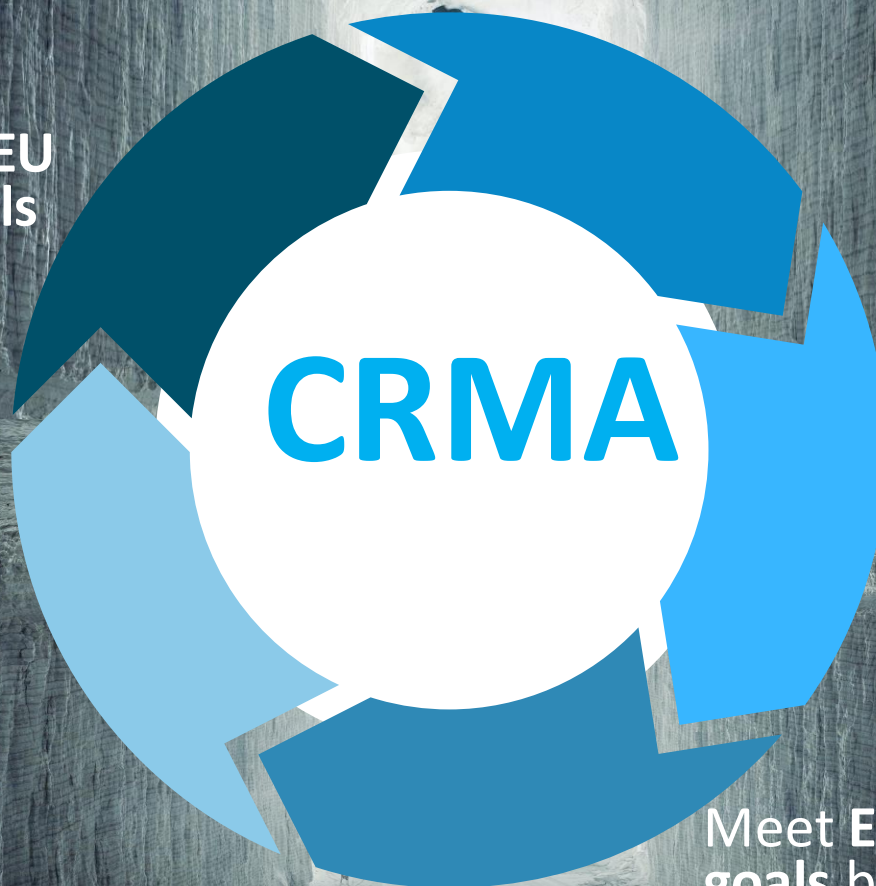
Membership



The Critical Raw Material Act – A paradigm shift

**Strengthen EU
raw materials
sector**

**Strengthening
global
partnerships,
investment,
production, and
trade**



Help strategic sectors:
renewable energy,
automotive, defense, AI, etc.

**Guarantee sustainable
and safe supply to
reduce dependencies**

**Meet EU climate and digital
goals by 2050**

Strategic Projects for the EU

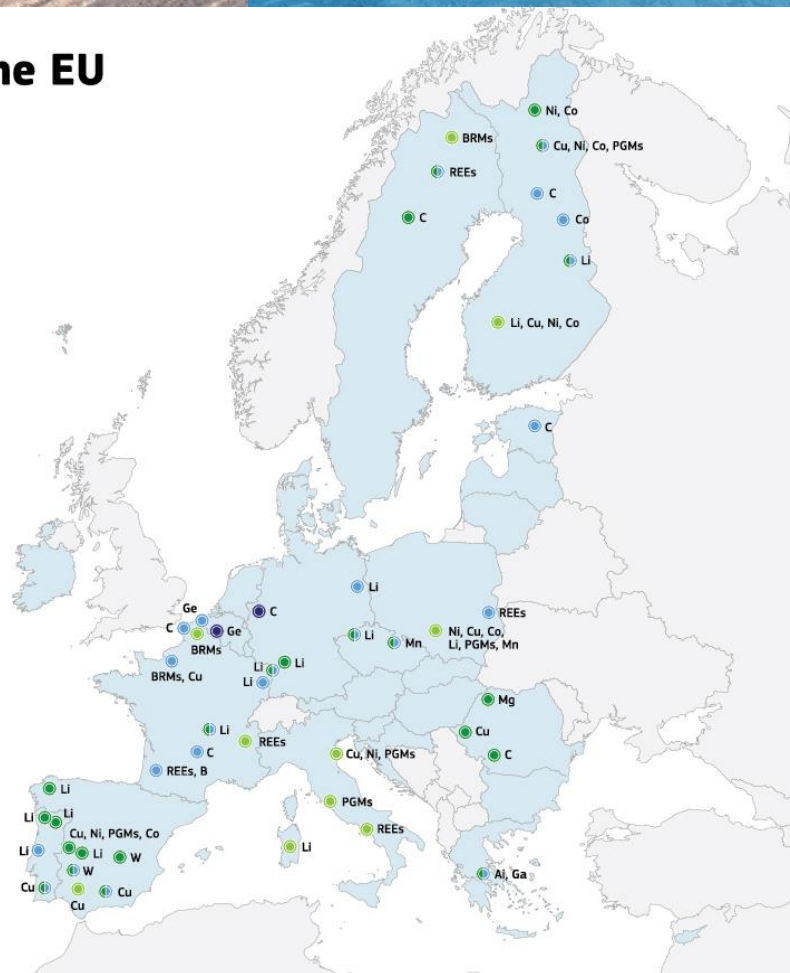
MAP LEGEND



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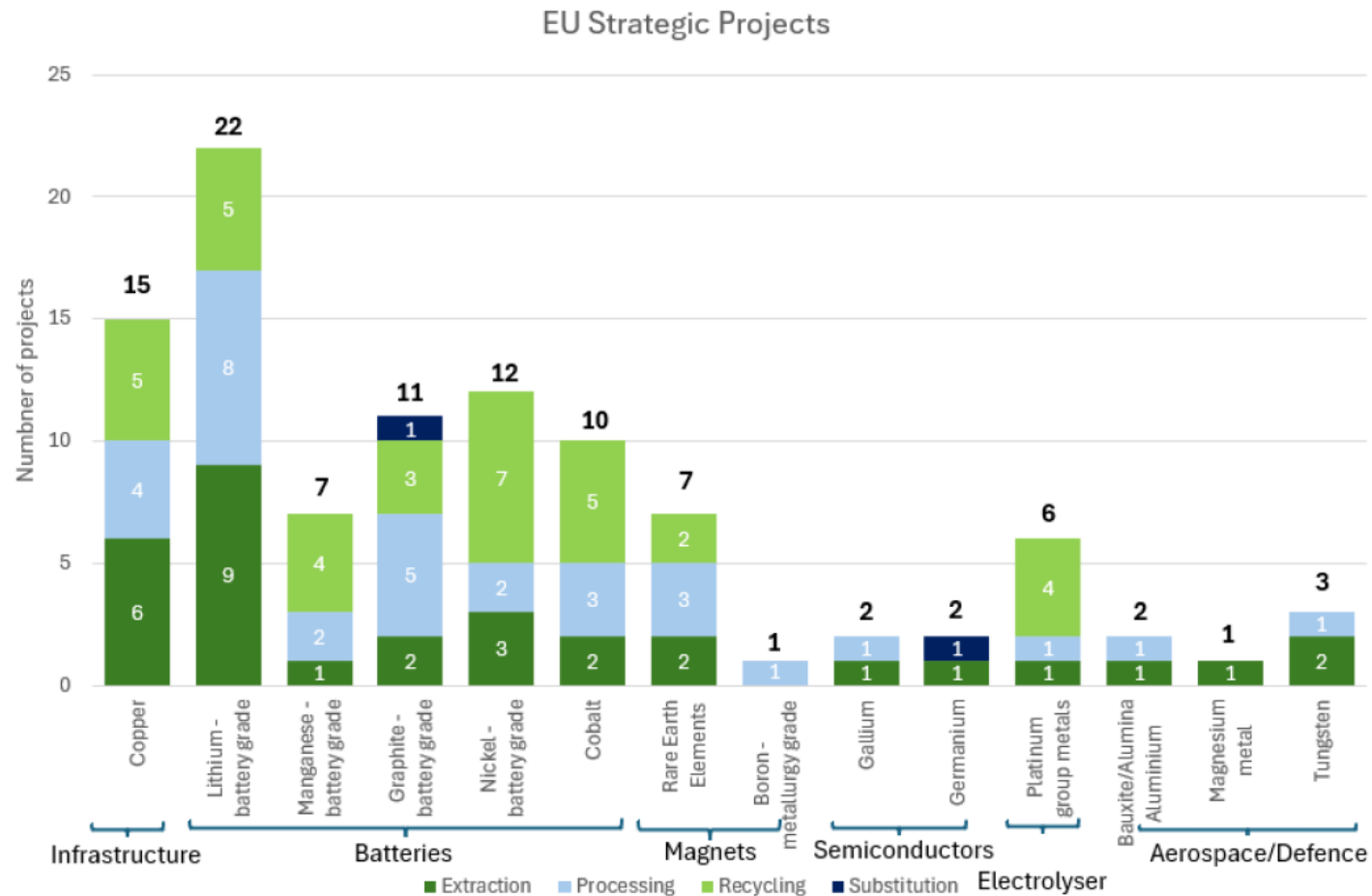
Where are we today with the CRMA?

- Next call for projects out now
- Accompanying measures planned
- CRM-Centre
- Competition rules
- Joint purchasing Platform
- Next EU Budget

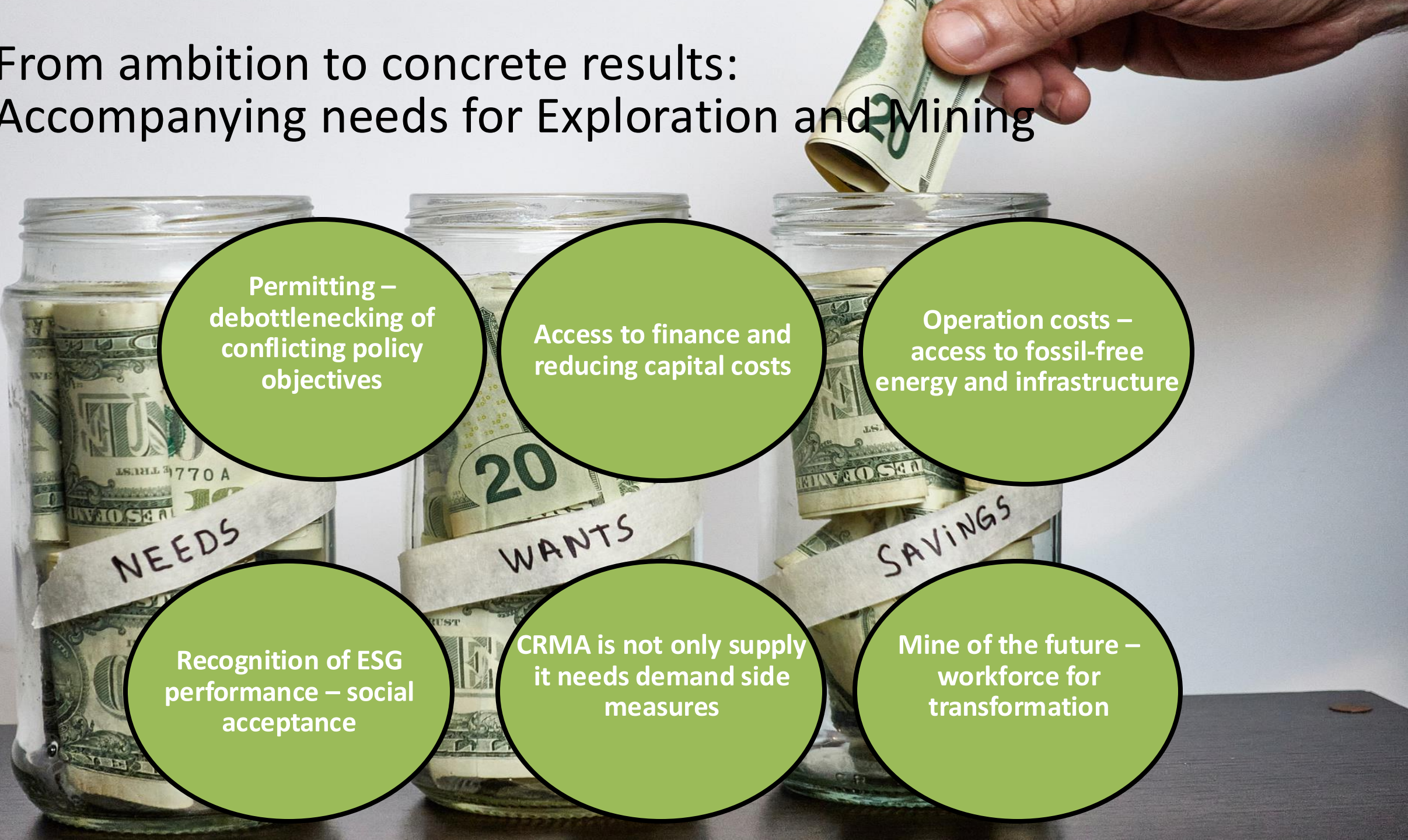
**60 Strategic projects
47 in the EU**

SRMs for strategic value chains

14 strategic raw materials covering strategic sectors in the EU



From ambition to concrete results: Accompanying needs for Exploration and Mining



Permitting –
debottlenecking of
conflicting policy
objectives

Access to finance and
reducing capital costs

Operation costs –
access to fossil-free
energy and infrastructure

Recognition of ESG
performance – social
acceptance

CRMA is not only supply
it needs demand side
measures

Mine of the future –
workforce for
transformation



Thank you

Euromines
European Association of Mining Industries,
Metal Ores & Industrial Minerals

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1150 Brussels-Belgium

www.euromines.org
secretariat@euromines.be

9:40 – 10:40 EIS Overview & Results