



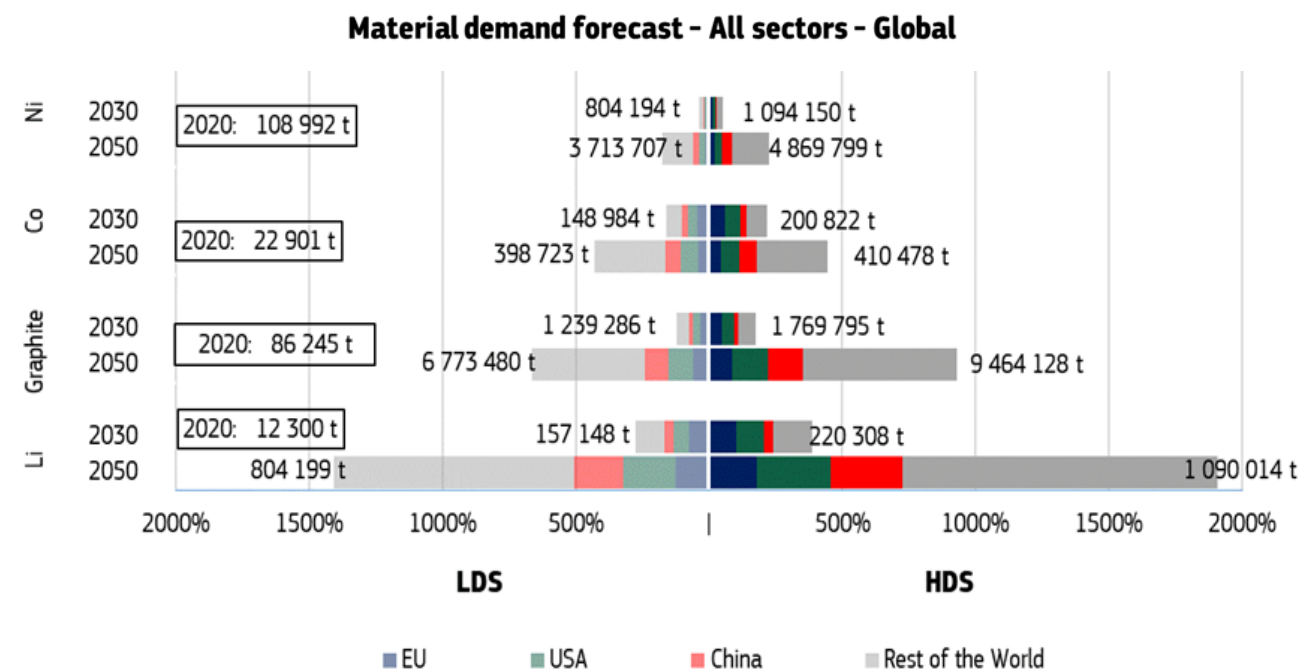
European CRM Act

Shaping Europe's resource security

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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



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

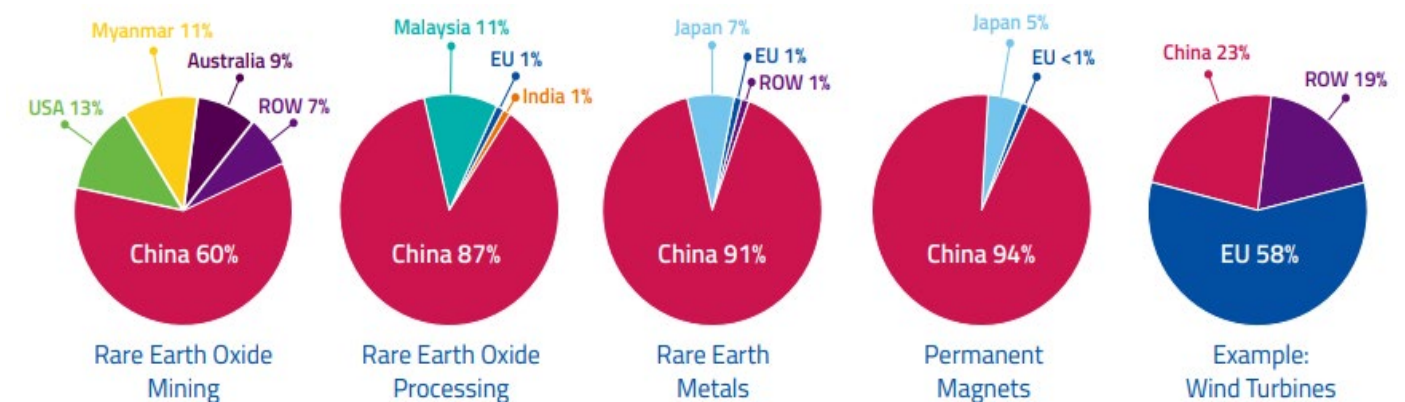


Fig. 3: From rare earths mining to wind turbine manufacturing: estimated market shares in 2019. Sources: Team analysis and Roskill 2018; Adamas Intelligence 2019; Peteves 2017; Carrara et al. 2020; IEA 2021; USGS 2021.

Source: European Raw Materials Alliance (ERMA)

European Critical Raw Materials Act

in force since 23 May 2024

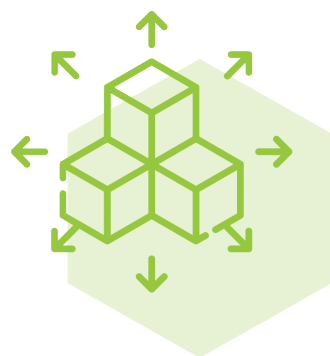
Ensuring a secure and sustainable supply of critical raw materials for the Union



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

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 **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.

Critical Raw Materials

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.

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/Aluminium**
- 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**
- **Graphite (Natural and synthetic)**
- **Nickel – battery grade**
- Niobium
- Phosphate rock
- Phosphorus
- **Platinum Group Metals**
- Scandium
- **Silicon metal**
- Strontium
- Tantalum
- **Titanium metal**
- **Tungsten**
- Vanadium

Strengthening the value chain

STRATEGIC PROJECTS

- ❑ Across the whole SRM value chain: **extraction** – **processing** – **recycling** and for **production** of **substitute materials**
- ❑ **Selected by the Commission with advice from the CRM Board based on**
 - Contribution to supply security
 - 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
- 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**
- **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

Timeline for the **STRATEGIC PROJECTS**



Strategic projects under the CRMA - European Commission (europa.eu)



Strategic Partnerships Raw Materials

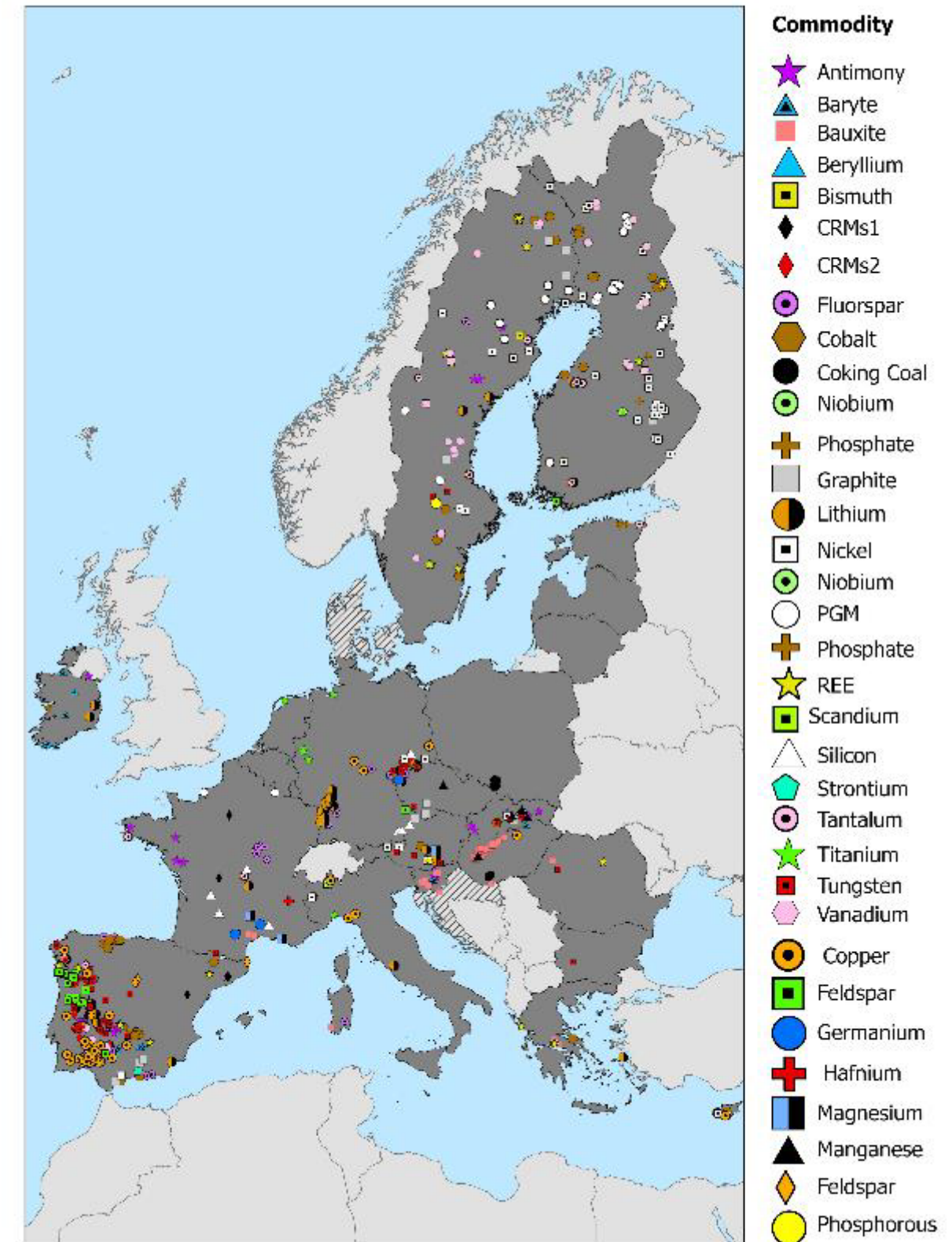


Strategic Projects mapping and monitoring – supported by EO?

Earth Observation could play a role in **mapping and monitoring strategic projects in the EU or non-EU partner countries**:

- Map and monitor the spatial evolution of selected EU strategic projects
- Baseline study of possible environmental impacts.
- Monitoring the environmental footprint of EU strategic projects: e.g.,
 - Land cover changes
 - Ground and structural stability
 - Water/Soil/Air pollution

EU database of CRM projects (2023)



Data gathered by the Commission with Member States

Risk monitoring and mitigation

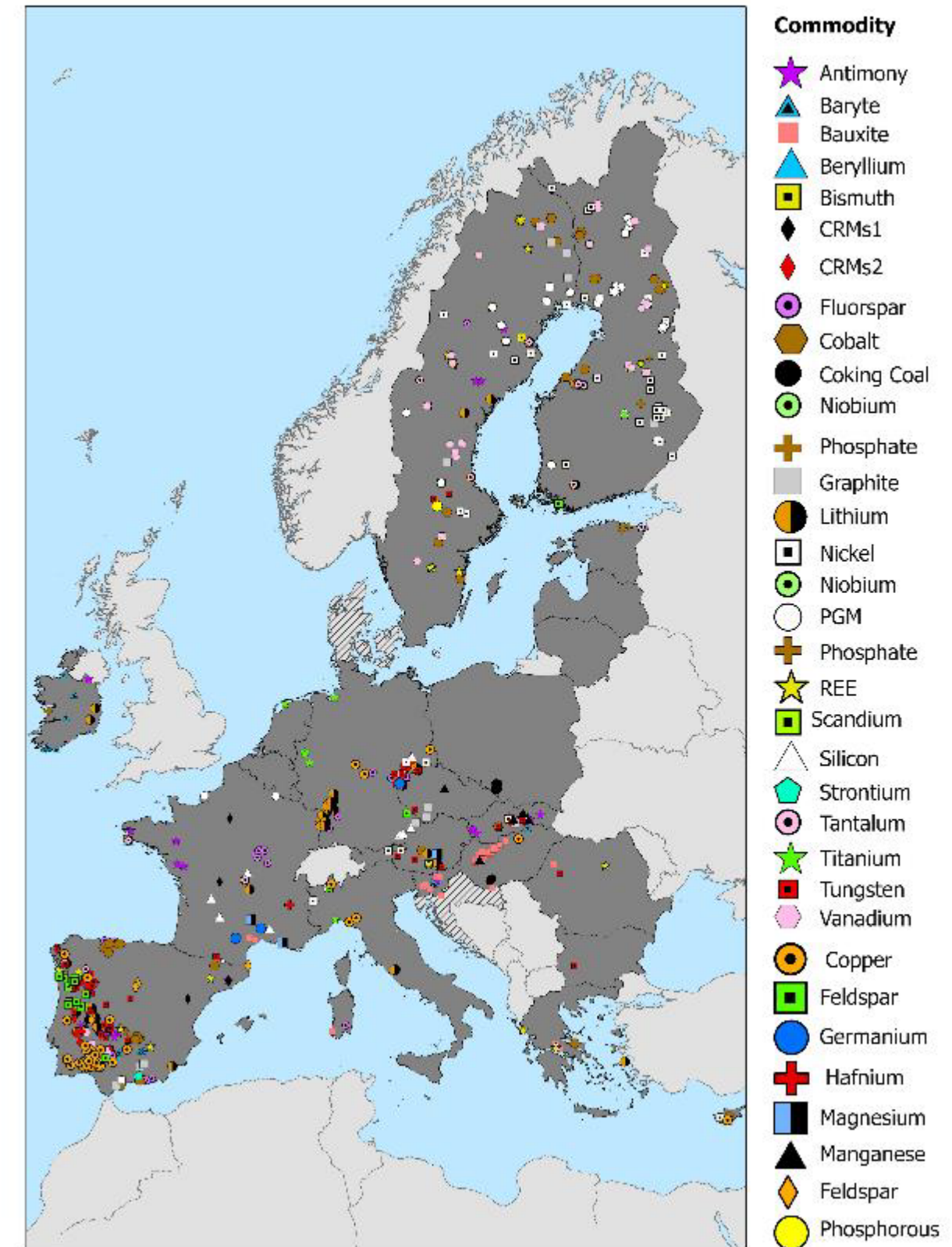
Risk monitoring

- **Assessment of critical and strategic raw materials**
- **Towards real time monitoring** (trade flows; demand and supply; concentration of supply; Union and global production)
 - Art. 21.1 MS to provide information on new or existing CRM projects on their territory
- **Early warning system**

Risk preparedness:

- **Stress testing**
- Reporting and coordination of **strategic stocks**
- Voluntary **joint purchasing**

EU database of CRM projects (2023)



Data gathered by the Commission with Member States

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

CIRCULARITY

- National measures on CRMs circularity
 - Increase reuse, collection and recycling
 - Increase use of secondary RM
 - Recycling technologies
- **Maximising potential from (closed) extractive waste facilities**
 - Art.27.4 MS shall establish a database of extractive waste facilities and their potential of CRMs.

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

Other Regulatory Measures

- Review of End of Life Vehicles Directive
- Codes in European list of Waste
- Harmonisation of Waste Management Rules
- Review Waste Electrical and Electronic Equipment Directive



Useful links

[CRM Act Press Release](#)

[CRM Act \(Regulation\)](#)

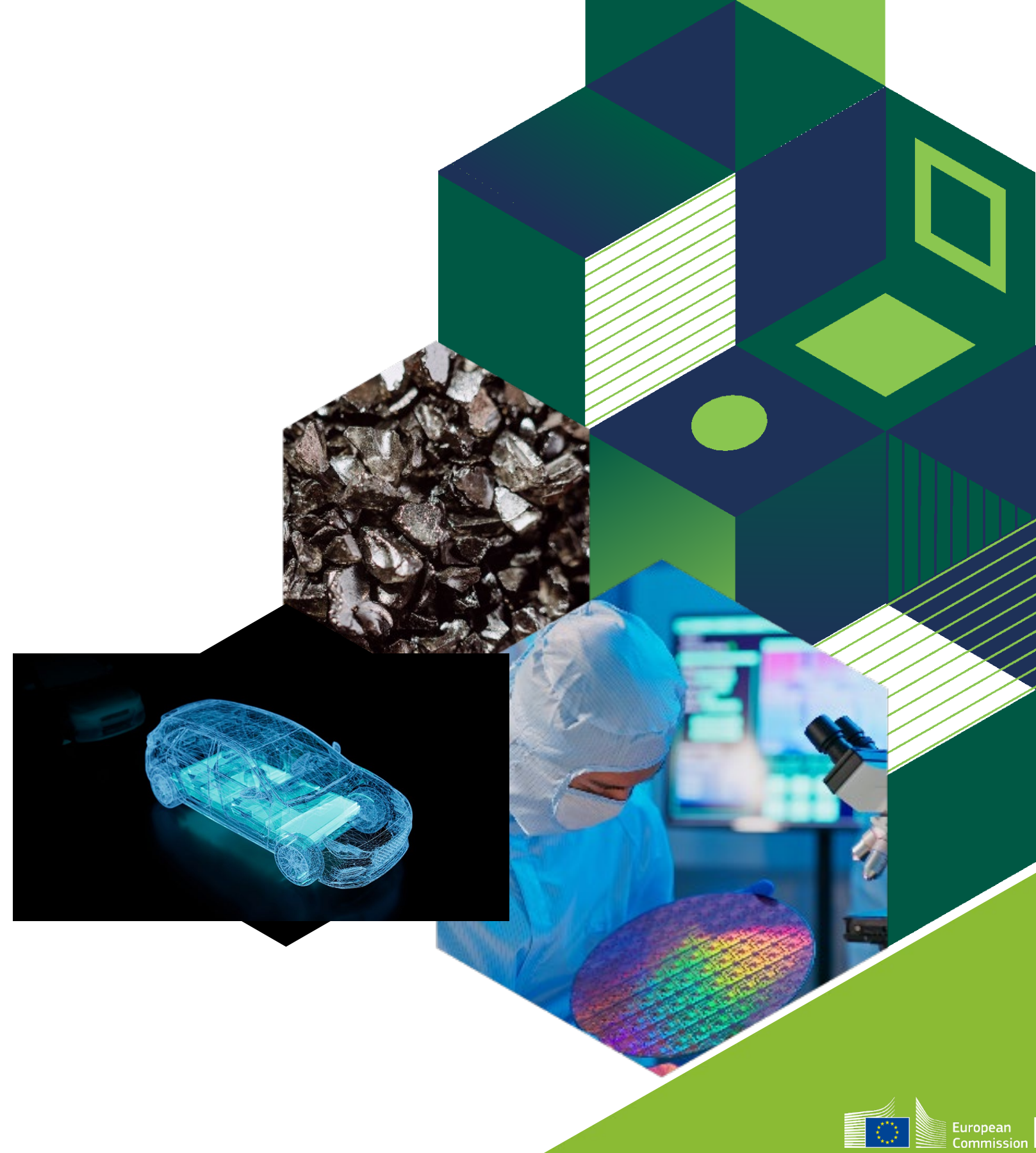
[CRM Act \(Communication\)](#)

[2023 JRC Foresight Study](#)

[2023 Study on CRMs for the EU](#)

[CRM Factsheets](#)

[Strategic Projects under CRMA](#)



Thank you



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