



SCREEN3

Coordination and Support Action (CSA)

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Summary

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WP14 WORK PROGRAM

DELIVERABLE D14.1 (V2)

WP14 Foresight Studies 1



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Organisation name of lead contractor for this deliverable:

EIT RawMaterials

DELIVERABLE TYPE		
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DMP	Data Management Plan	
O	Other	
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PU	Public (fully open)	X
SEN	Sensitive, limited under the conditions of the Gran Agreement	

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V3			

VALIDATION	
AUTHORS	REVIEWERS
Jenni Kiventerä	Reviewer 1: Gaetan Lefvebre
Patrick Nadoll	Reviewer 2: Clara Demagne
Roland Gauß	

EXECUTIVE SUMMARY

The work program for WP14 extends on the proposal's work plan and lays out detailed timelines, tasks, and assignments for the progression of the WP. Furthermore, the meeting with the European Commission (DG Grow, JRC Petten) and the WP14 kick-off meeting notes and outcomes are detailed here. A preliminary priority list for the rapid response topics has been established and key dates have been agreed upon with the EC.

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LIST OF ABBREVIATIONS AND ACRONYMS

CA – Consortium Agreement

D – Deliverable

DoA – Description of Action

EC – European Commission

GA – General Assembly

H2020 – Horizon 2020 The 8th EU Framework Programme for Research and Innovation.

HEU – Horizon Europe – the 9th framework Programme of the EC for research, technological development and innovation activities.

IPR – Intellectual Property Right

KOM – Kick-off meeting

PC – Project Coordinator

SC – Steering Committee

SME – Small and Medium Enterprise

WP – Work package

SCREEN3 WP14 KOM | D14.1

5th of March 13.30-15.00 CET

1.1 Attendance

Patrick Nadoll	EIT RM
Jenni Kiventerä	EIT RM
Marina Cabidoche	EuroGeoSurveys
Tercero Espinoza, Luis Alberto	Fraunhofer
Audrey Hertz	CEA
Irena de Séjournet	EuroGeoSurveys
Dehaine Quentin (GTK)	GTK
Berrill, P. (Peter)	Uni Leiden
Calignano, E. (Elisa)	TNO
Roland Gauß	EIT RM
Tejal Giridhari Gangurde	EIT RM
Marie Bouvet Dit Marechal	CEA
Lefebvre Gaetan	BRGM
Nabeel Mancheri	REIA
Kivinen Mari (GTK)	GTK
Bertelli Martina (GTK)	GTK
CARRARA Samuel (JRC-PETTEN)	JRC
Alessa Hool	IRTC
PRIOR ARCE Angel (JRC-PETTEN)	JRC
Stam, J.C. (Jelte)	TNO
Rietveld, E. (Elmer)	TNO

1.2 Summary of the meeting with DG GROW and JRC Petten

Patrick Nadoll opened the meeting and presented the notes from the meeting with DG Grow and JRC Petten, which took place prior to the KOM, in the morning.

Summary of the meeting with EC:

- EC will provide the schedule and prioritisation of the possible topics
- EC will provide the format of how these reports should be provided
- In this meeting, the main aim is to map the strengths of the WP14/15 team
- The results from these actions are called working papers; at least three need to be prepared in the first half of the project (up to M19)
- Foresight reports for the CRM act will be published in November 2025, so SCREEN3 input for these foresight reports must be sent to DG Grow in May 2025

1.3 Examples of the topics suggested by DG GROW

Gaetan Lefebvre presented the key findings from the DG Grow meeting with 4 main ideas to take away from SCRREEN3 insights:

- Strategic market insights (Ownership structure (geopolitics) of some specific strategic RMs)
- Technologies that are changing rapidly - substitution possibilities (e.g.: Na-ion batteries, H2 Electrolysers)
- Continue the good work on REE magnets and motors
- Supply forecasts (even more important than focusing on demand)

1.4 Mapping strengths in the consortium:

The next step is to map the strengths within the consortium and provide this information to DG GROW.

- EIT RM provided a link for the Excel file where all attendees could provide their feedback (strengths, i.e., specific value changes market segments, etc., comments)
- EIT RM collected the input from the list and provided this information for further discussion with DG GROW (see Annex 1).

During the discussion the point was made that we should also focus on actions needed to decrease demand for critical and strategic raw materials; a point that especially NGOs have lobbied for.

1.5 Next steps:

1. Internal (SCRREEN Consortium) and external (DG Grow and JRC) evaluation of priority (strengths) list (see appendix table!)
2. EIT RM will propose a follow-up meeting with DG Grow ahead of the next WP14 quarterly meeting (end of April/early May)
3. Based on feedback and the outcome of the priority list, EIT RM will create an agenda for the next meeting in Q2, to be scheduled at the end of May (→ 27-31 May)
4. Based on DG Grow's feedback EIT RM will coordinate potential task forces around specific topics and deliverables (see appendix table)
5. DG Grow will provide a must-have list of content definitions to clarify what needs to be included in the deliverables (reports) and how. (→ April 2024)

DEVIATIONS

The delivery date was delayed because as a prerequisite for the deliverable the kick-off meeting with the European Commission and the WP task leaders had to be completed first.

ANNEXES

ANNEX 1 Topic list

Table 1 List of topic choices with corresponding contacts.

Organisation	First Name	Last Name	Topic Choice (Expert insights existent or planned)	Notes
EIT RM	Patrick	Nadoll	Ga/Ge supply chain, steel sector supply chain, REE	
BRGM	Ga��tan	Lefebvre	Blackmass as strategic secondary material to be kept in the EU to achieve CRM at goals -what strategy? / Adding analysis on scenarios with more various pathways (including a reduced demand scenario)	Strengths at BRGM and OFREMI on secondary resources, supply forecasts and potentially geopolitical consideration (stress-tests tasks)
CML Uni Leiden (ULEI)	Peter	Berrill	Supply forecasts, based on economic drivers. Mapping of materials to final products and estimates of in-use stocks by final products or product groups. Reduced demand scenarios	
CEA	Marie	Bouvet	Technological gaps & opportunities to achieve the objectives of the CRM Act (e.g., 15% recycling for a specific techno - batteries / magnets?) > Which existing limitations regarding the capacities, available technologies and facilities across Europe, which needs of "harmonization" among countries, which opportunities (including logistics, etc.) to secure the secondary supply?	
CEA	Marie	Bouvet	Recycling & Substitution > e.g. Assessment of substitution materials for energy: new technologies & circular economy strategies	
CEA	Marie	Bouvet	Analysis of cooperation strategies among the industries for strategic sectors (geopolitical aspects, among others)	
GTK	Mari	Kivinen	We can contribute to (according to our SCRREEN3 resources), e.g., on 1) ownership reviews based on S&P Capital IQ data, 2) review of existing supply forecasts, 3) assessing main ESG constraints to supply, e.g., for Co & Ni.	
Fraunhofer	Luis	Tercero Espinoza	Base metals (Cu, Zn) and steel; new 2D criticality matrix (projection 2030/2040); What are the gaps for each CRM (recycling, mining, processing) in fulfilling CRMA targets? What is realistic?	