

Request for proposal:

Nickel and Cobalt Value Chain Study: EU Supply–Demand Gap and Strategic Project Identification Outside the EU

1. Overview of EIT RawMaterials

EIT RawMaterials is a ‘Knowledge and Innovation Communities’ (KICs) created by the European Institute of Innovation and Technology (EIT), aimed at promoting innovation in the raw materials sector across Europe. Established in 2015, EIT RawMaterials works to secure the sustainable supply of raw materials to the European industry by driving innovation, education, and entrepreneurship along the entire raw materials value chain.

We are a knowledge-driven business and a catalyst for industrial progress. Our offerings leverage our expertise and that of our network – the world's largest network in the raw [and advanced] materials sector – which includes companies at every stage of evolution, from start-ups to market leaders, along with leading international universities, research organisations, and top experts and future talent from the sector.

Our activities span from mining and mineral processing to material recycling and substitution, focusing on increasing resource efficiency and fostering a circular economy.

We inform policy, apply knowledge, accelerate innovation, create opportunity, and unlock commercial value – for our partners and customers throughout the raw materials value chain to develop the raw materials sector as a strategic strength and foundation for a secure, sustainable future for Europe.

Our offerings are designed to help our partners and industry to be part of Europe’s strategic agenda to ensure supply chain security and make the ‘Green New Deal’ a reality that benefits the people of Europe and partner nations.

For more information about our company please visit the following website:

<https://eitrawmaterials.eu/>

2. Background, Scope of Work, and Expected Deliverables

2.1. Background and Context

Nickel and Cobalt are listed as a critical raw materials under the EU Critical Raw Materials (CRM) Act. In response, several EU partner countries are actively developing their Ni and Co mining sectors, with a number of promising projects currently underway. Given the complexity of the Ni and Co value chains— from extraction to processing and end-use applications, a global perspective is essential for a comprehensive assessment of these commodities. Rather than focusing on individual country analyses, the final output should provide an integrated global overview of the Ni and Co value chains. This will support EU Delegations and Headquarters (HQ) staff in identifying and prioritising strategic projects outside the EU to address supply gaps, supported by clear justification for their selection.

2.2. Scope of work

A robust understanding of internal EU demand and supply dynamics is a critical starting point. This requires a detailed assessment of current and projected Ni and Co demands in the EU, disaggregated across key end-use sectors.

For cobalt, these include batteries, superalloys, hard metals, and catalysts. For nickel, key applications are steels, batteries, alloys and superalloys, electroplating, and other uses.

Particular attention should be given to the dominant end-use segments— **namely batteries for cobalt and batteries and stainless steel for nickel**—through a deeper analysis of demand. For example, in case of battery sector, demand should be further broken down by application, including battery electric vehicles (BEVs), plug-in hybrid electric vehicles (PHEVs), heavy duty, portable electronics, stationary energy storage systems (ESS), etc.

In parallel, it is essential to evaluate the extent to which this demand is currently met, and can be met in the future, by existing and planned EU-based projects across the value chain.

Building on this EU baseline and gap analysis, the study should then determine the scale, nature, and geographical focus of investments required outside the EU to bridge these supply gaps. This external perspective must remain closely anchored to the EU's needs, while ensuring alignment with the objective of avoiding excessive reliance on a single third country (i.e. limiting dependency to no more than 65%).

In this context, the analysis of third-country projects should be framed as a targeted exercise aimed at identifying those assets most relevant for addressing the EU's uncovered demand. At the global level, the study will therefore examine the current state of the Ni and Co sectors in relation to EU needs, and identify and prioritise major projects that could support the EU through investment or strategic cooperation. The evaluation will consider technical and financial aspects, permitting status, and project maturity, alongside key regulatory, socio-economic, environmental, and infrastructural challenges, taking account as well the technical viability of different Ni and Co extraction pathways (e.g. hard rock, brine, geothermal, and other unconventional sources), considering their level of technological maturity, scalability, and associated processing complexities.

Overall objective: To provide a data-driven, global assessment of the Ni and Co value chains to inform EU strategic investment and cooperation priorities, including the identification and prioritisation of strategic projects outside the EU to address supply gaps in Europe.

Specific objectives:

- Quantify EU demand–supply balance and future gaps
- Identify and prioritise relevant third-country projects
- A value chain approach shall be applied throughout the analysis, considering downstream demand dynamics, as this might influence the relative attractiveness of different Ni and Co projects for investment and sourcing.
- Assess project risks (technical, regulatory, ESG, geopolitical)
- Provide actionable recommendations for EU external engagement

2.3. Deliverables

- Main deliverable: A concise (max. 40 pages), evidence-based report detailing the key findings against each objective set out in the Terms of Reference, to provide actionable recommendations for EU policymakers and investors
- Supporting outputs: PowerPoint summary (15–20 slides), 1–2 pages factsheet, Excel database of projects, and all underlying datasets used in editable formats (.xlsx)

Please note that the information provided in section 2 in this Request for Proposals (RfP) is indicative and non-exhaustive; the complete description of the project, including all requirements, scope of work, and deliverables, is set out in the Terms of Reference (ToR).

3. Proposal Process

3.1. Participation

Participation in this proposal procedure is open to all tenderers.

All participants must sign the Tenderers' declaration form attached and submit it with the proposal. Please note that the tenderer may not modify the text, it must be submitted signed as provided by EIT RawMaterials attached to this request for proposal document.

3.2. Submission of proposal

EVENT	DATE (Calendar dates)
Publishing the RFP on EIT RawMaterials website	July 8 th , 2026
Deadline for requesting clarification from EIT RawMaterials	July 17 th , 2026
Deadline for submitting proposals	July 24 th , 2026
Intended date of notification of award	July 31 st , 2026
Intended date of contract signature	August 17 th , 2026

Proposals must be emailed in English to the following addresses:

Andrea Itziar Pitillas Martinez, Senior Advisor Battery Materials,
Email: andrea.martinez@eitrawmaterials.eu
Phone: +491732464317

and

Krzysztof Marański, Business Development Manager
Email: krzysztof.maranski@eitrawmaterials.eu
Phone: +4915203521049

and

André Ufer, Coordinator Critical Raw Materials Facility
Phone: +49 162 748 2154
Email: andre.ufer@eitrawmaterials.eu

The proposal shall contain:

- The completed Annex 1 – Technical and Financial Proposal Template found in the ToR, addressing both the technical response to the requested services (section 2 and the TOR) and the financial offer (the price for the services).
- As part of the evaluation, bidders are encouraged to submit a concise sample deliverable (1–2 pages or slides) related to the subject matter. Such material will be considered positively as it allows assessment of the quality, rigor, and relevance of their work.
- The financial offer must be presented in Euro. Prices must be indicated as net amount + VAT.
- Information on GDPR compliance, where applicable
- an indication of Supplier’s insurance coverage. The proposal must specify whether the supplier has taken out a company liability insurance and/or professional liability insurance including the maximum amount of coverage in Euro per event per insurance
- The Tenderers’ declaration form.

Please note that the proposal must clearly include:

- Any assumptions or exclusions, including elements of the Terms of Reference (ToR) that cannot be delivered, explicitly stated

Proposals must be concise and clear. The tenderer’s proposal will be incorporated into any contract that results from this procedure. Tenderers are, therefore, cautioned not to make claims or statements that they are not prepared to commit to contractually. Subsequent modifications and counterproposals shall, if applicable, also become an integral part of any resulting contract.

The tenderer represents that the individual submitting the natural or legal entity’s proposal is duly authorized to bind its entity to the proposal as submitted. The tenderer also affirms that it has read the instructions to tenderers in this RfP document and that it has the experience, skills and resources to perform, according to conditions set forth in this proposal and the tenderers’ proposal.

3.3. Requests for additional information or clarification

In case the tenderers are in need of additional information or clarification, please address it to the address below. All information requested or answered may only be done through written communication – email only. All questions should be sent prior to the deadline for requesting clarification as specified in section 2.2.

Andrea Itziar Pitillas Martinez, Senior Advisor Battery Materials,
Email: andrea.martinez@eitrawmaterials.eu
Phone: +491732464317

and

Krzysztof Marański, Business Development Manager
Email: krzysztof.maranski@eitrawmaterials.eu
Phone: +4915203521049

3.4. Validity of the proposals

Tenderers are bound by their proposals 90 days after the deadline for submitting proposals.

3.5. *Costs for preparing proposals*

No costs incurred by the tenderer in preparing and submitting the proposal are reimbursable. All such costs must be borne by the tenderer.

1.1. *Ownership of the proposals*

EIT RawMaterials retains ownership of all proposals received under this procedure. Proprietary information identified as such, which is submitted by tenderers in connection with this procurement, will be kept confidential.

The potential or actual supplier should accept that during the implementation of the contract and for four years after the completion of the contract, for the purposes of safeguarding the EU's financial interests, EIT RawMaterials may transfer the proposal and the contract of the supplier to internal audit services, to the European Court of Auditors, to the Financial Irregularities Panel or to the European Anti-Fraud Office.

1.2. *Clarification related to the submitted proposals*

After submission, proposals shall be reviewed for compliance with formal requirements as set forth in this RfP document. Where information or documentation submitted by the tenderers are or appears to be incomplete or erroneous or where specific documents are missing, EIT RawMaterials may request the tenderer concerned to submit, supplement, clarify or complete the relevant information or documentation within an appropriate time limit. All information requested or answered may only be done through written communication – email only.

1.3. *Negotiation about the submitted proposal*

After reviewing the formal compliance of the tenders, EIT RawMaterials may negotiate the contract terms with the tenderers. In this negotiation EIT RawMaterials will request all tenderers to adjust the proposal or specific sections of the proposal within an appropriate time limit. In case of negotiations, EIT RawMaterials shall provide further information about the proceedings and timing.

1.4. *Evaluation Criteria*

Each proposal will be evaluated in accordance with the below mentioned award criteria. The award criteria will be applied in accordance with the requested services indicated in section 2 of this RfP document.

Criterion	Description	Weight
1. Implementation	Description of the implementation approach to the scope of the work as outlined under section 2	30%
2. Team/Individual Expert Experience	Relevant experience of the proposed team or individual expert, including demonstrated knowledge of the geographical and/or market context.	30%
3. Budget	The budget is in line with the work efforts as well as additional costs of goods and services required for the implementation	40%

1.5. Signature of contract

The successful and unsuccessful tenderers will be informed in writing (via email) about the result of the procedure.

1.6. Appeals/complaints

Tenderers believing that they have been harmed by an error or irregularity during the tender procedure may file a complaint. Appeals should be addressed to EIT RawMaterials. EIT RawMaterials is only able to address complaints before the contract is awarded to the successful tenderer.

1.7. Cancellation of the procedure

EIT RawMaterials reserves the right to suspend or cancel the procedure, where the procedure proves to have been subject to substantial errors, irregularities or fraud. If substantial errors, irregularities or fraud are discovered after the award of the contract, EIT RawMaterials may refrain from concluding the contract.

In the event of cancellation of the procedure, EIT RawMaterials will notify the tenderers of the cancellation. In no event shall EIT RawMaterials be liable for whatsoever, including, without limitation, damages for loss of profits, in any way connected to the cancellation of the procedure.

1.8. Ethics clauses / Corruptive practices

The supplier shall take all measures to prevent any situation where the impartial and objective implementation of the contract is compromised for reasons involving economic interest, political or national affinity, family or emotional ties or any other shared interest ('conflict of interests'). He should inform EIT RawMaterials immediately if there is any change in the above circumstances at any stage during the implementation of the tasks.

Furthermore, the supplier acknowledges and accepts the Code of Conduct of EIT RawMaterials which can be downloaded via www.eitrawmaterials.eu