Ref. Ares(2025)11178762 - 15/12/2025

IDEALIST

# [D7.3] Stakeholder Handbook – Industrial Supply Chains

**IDEALIST**

3 INDUSTRIAL ECOSYSTEMS TACKLING SUPPLY CHAINS DISRUPTIONS AND BOOSTING ADVANCED TECHNOLOGIES UPTAKE

# DELIVERABLE INFORMATION

| DELIVERABLE # | DELIVERABLE TITLE |
|---|---|
| **Related Work Package** | WP7: BEYOND SUPPLY CHAINS: "towards more resilient value chains" |
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| **G.A. Number / Funding Body** | 101138366 / European Health and Digital Executive Agency (HADEA) |
| **Start date / Project Duration** | Dec 2024 / 36 Months |
| **Type of Deliverable (R, DEM, DEC, Other)[1]** | R |
| **Dissemination level (PU, CO. CI)[2]** | PU |
| **Date of Last Update** | June 25th. 2025 |
| **Project Website** | https://www.idealist-project.eu/ |

| REVISION NO | DATE | DESCRIPTION | AUTHOR(S) |
|---|---|---|---|
| **1** | 02/12/2025 | Final | CCB |
| | | | |
| | | | |

[1] R=Document, report; DEM=Demonstrator, pilot, prototype; DEC=website, patent fillings, videos, etc.; OTHER=other
[2] PU=Public, CO=Confidential, only for members of the consortium (including the Commission Services), CI=Classified

Funded by the European Union

The IDEALIST project has received funding from the European Union's Horizon Europe programme under the Grant Agreement number no. 101138366

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This Deliverable of IDEALIST was funded by the European Union's Horizon Europe Programme under grant agreement No 101138366.

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# Stakeholder Handbook

**Introduction**

The *Stakeholder Handbook* offers a structured overview of key EU-level umbrella organisations, associations, and alliances representing the "supply-side" of Europe's industrial ecosystems—specifically those involved in the supply of raw materials and the conversion of feedstocks.

The purpose of this handbook is to facilitate targeted outreach and engagement of these stakeholders in the context of the **AGORA platform**. By mapping and summarising these actors, the handbook supports the promotion of AGORA among relevant industry networks, ultimately strengthening dialogue and collaboration within EU industrial policy initiatives.

**Structure of the Handbook**

The *Stakeholder Handbook* is organised around the three strategic industrial ecosystems defined by the European Commission:

Aerospace & Defence

Energy-Intensive Industries

Mobility, Transport & Automotive

Each entry includes:

**Name**

**Brief description of the organisation**

**Mission and key focus areas**

**Relevant ecosystem(s)** (sector-specific or cross-sectoral)

Additionally, the handbook highlights pan-European platforms and initiatives that span multiple ecosystems but are crucial for strategic value chains and supply resilience.

This document is intended as a practical reference for policymakers, cluster organisations, industry stakeholders, and project partners working to strengthen Europe's industrial foundations through coordinated stakeholder engagement.

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## European Chemical Industry Council (Cefic)

**Sector:** Energy-Intensive Industries

**Description:** Cefic is the main forum for chemical companies in Europe, representing about 28 000 firms—large, medium, and small—with a workforce of ~1.2 million and approx. 13% of global chemical production

**Mission & Vision:** Support a sustainable, competitive, and resilient EU chemical industry aligned with the European Green Deal and Paris Agreement.

**Structure & Membership:** Non-profit (AISBL) with ~650 members including national federations; governed via a General Assembly, Board, Executive Committee, plus advisory councils.

**Role in the European Ecosystem:** Key contributor to policies like REACH, Responsible Care®, and CSRD; drives sustainability and innovation in the chemical sector.

**Key Activities & Initiatives:**

- Responsible Care® programme
- REACH 10-point action plan
- Horizon Europe research projects
- Mid-Century Vision and sustainability white papers

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## EuPC – European Plastics Converters

**Sector:** Energy-Intensive Industries

**Description:** EuPC is the EU-level trade association of plastics converters—manufacturers of semi-finished and finished plastic goods—with over 1.6 million workers in ~50 000 companies, generating ~€280 bn annual turnover

**Mission & Vision:** Champion a fair single market, resource efficiency, circular economy, and innovation across divisions like Packaging, Construction, and Automotive.

**Structure & Membership:** Brussels-based AISBL representing 28 national associations and 18 sectoral organisations; organised into three market divisions.

**Role in the European Ecosystem:** Bridges converters, recyclers, and policymakers; influences EU policy under the Plastics Strategy, Eco-design, and recycled content mandates.

**Key Activities & Initiatives:**

- VinylPlus & MORE platform (circularity pledges)
- Advocacy on recycled polymers and EU waste directives

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## Eurometaux – European Association of Metals

**Sector:** Energy-Intensive Industries

**Description:** Eurometaux represents Europe's non-ferrous metal producers and recyclers—500 000 employees across 900+ sites—with a turnover of ~€120 bn.

**Mission & Vision:** Ensure a thriving, circular non-ferrous metals industry to support Europe's climate and clean-energy transitions.

**Structure & Membership:** Non-profit (AISBL) with members including metal companies and national federations; governed by a Board and Directorate-General.

**Role in the European Ecosystem:** Influences policy on circular economy, chemicals, trade, energy, and sustainable finance; promotes metals in EU industrial strategy.

**Key Activities & Initiatives:**

- Metals Action Plan
- Annual "Metals Day" conference
- Policy papers on recycling and raw material dependence

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## ETRMA – European Tyre & Rubber Manufacturers Association

**Sector:** Energy-Intensive Industries

**Description:** ETRMA represents EU tyre and rubber producers—4 400 companies with 112 000 employees (up to 500 000 with suppliers).

**Mission & Vision:** Promote a competitive, innovation-driven, safe, and sustainable tyre and rubber industry, contributing to smart mobility and circularity.

**Structure & Membership:** Non-profit with 14 corporate members plus national bodies; managed by a Board and policy-focused working groups.

**Role in the European Ecosystem:** Shapes EU tyre policy on safety, emissions, trade, deforestation, circular economy, and ETS.

**Key Activities & Initiatives:**

- #TRACTION4CHANGE manifesto
- TyreAWARE safety initiative
- Advocacy for retread promotion, harmonised waste criteria, ETS inclusion.

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## Eurofer – European Steel Association

**Sector:** Cross-sector

**Description:** Eurofer is the Brussels-based association for EU steel producers, representing 500+ sites, €191 bn turnover, ~140 Mt production, and 303 000 direct workers (2.27 M indirect).

**Mission & Vision:** Support a competitive, sustainable, and innovative steel industry to power Europe's clean transition.

**Structure & Membership:** AISBL founded in 1976; led by a Director-General, Board, and expert teams; includes national federations and EU producers.

**Role in the European Ecosystem:** Influences CBAM, ETS, Green Deal, safeguards, trade defense, and policymaking; leads ESTEP.

**Key Activities & Initiatives:**

- European Steel Technology Platform (ESTEP)
- Steel Action Plan and Strategic Dialogue on Steel
- Skills and decarbonisation efforts

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## European Precious Metals Federation (EPMF)

**Sector:** Energy-Intensive Industries

**Description:** EPMF is the voice of the European precious metals industry, covering the entire value chain from mining and refining to fabrication and recycling. It promotes responsible sourcing and sustainable use of precious metals in Europe and globally.

**Mission & Vision:** To ensure the sustainable growth of the European precious metals industry by promoting innovation, high environmental and safety standards, and transparent governance.

**Structure & Membership:** Comprises major companies involved in all stages of the precious metals lifecycle. Operates under a secretariat based in Brussels and works closely with international industry partners.

**Role in the European Ecosystem:** Influences EU policy on raw materials, circular economy, sustainability, and chemicals (e.g., REACH), and supports the classification of precious metals as strategic materials.

**Key Activities & Initiatives:**

- Advocacy on responsible sourcing (e.g. conflict minerals)
- Research and data provision on precious metals' contribution to green technologies
- Collaboration with EU institutions on recycling and critical raw materials

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## European Raw Materials Alliance (ERMA)

**Sector:** Cross-sector

**Description:** ERMA is an initiative launched by the European Commission to strengthen Europe's strategic autonomy in securing raw materials for green and digital transitions. It connects industry, academia, and policymakers.

**Mission & Vision:** To make Europe resilient in raw material supply by supporting sustainable mining, refining, processing, and recycling, and to reduce dependency on third-country imports.

**Structure & Membership:** Coordinated by EIT RawMaterials and composed of more than 700 stakeholders from across the EU. Operates in thematic clusters, focusing on investment and project pipelines.

**Role in the European Ecosystem:** Strategically aligns with the Critical Raw Materials Act (CRMA) and EU Green Deal. Supports industrial alliances and de-risking of raw material supply chains.

**Key Activities & Initiatives:**

- Strategic project pipeline development
- Investment matchmaking
- Input to EU raw materials strategies and CRMA implementation

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## ALLPROS.eu – Secretariat for the European Alliance on Processors and Semiconductor Technologies

**Sector:** Cross-sector

**Description:** ALLPROS.eu is the secretariat for the European Semiconductor Alliance, providing coordination and stakeholder engagement to advance processor and semiconductor innovation in Europe.

**Mission & Vision:** To support European leadership in semiconductor manufacturing, enhance design capabilities, and build a resilient supply chain for microelectronics.

**Structure & Membership:** Operated by a consortium of European partners and supported by the European Commission. Includes industrial players, R&D institutions, and regional stakeholders.

**Role in the European Ecosystem:** Central to the implementation of the EU Chips Act and Europe's digital sovereignty goals. Supports dual transitions through secure access to advanced electronics.

**Key Activities & Initiatives:**

- Coordination of the Industrial Alliance on Semiconductors
- Strategic agenda setting and roadmap development
- Events and ecosystem-building initiatives

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## EBA250 – European Battery Alliance

**Sector:** Cross-sector

**Description:** EBA250 is the industrial stakeholder platform of the European Battery Alliance. It supports the development of a competitive and sustainable battery value chain in Europe.

**Mission & Vision:** To position Europe as a global leader in sustainable battery technologies, from raw materials to recycling, ensuring energy security and industrial competitiveness.

**Structure & Membership:** Managed by EIT InnoEnergy; consists of over 800 stakeholders including industries, governments, research institutes, and NGOs.

**Role in the European Ecosystem:** Contributes to the Green Deal and Fit-for-55 by enabling clean mobility and energy storage solutions. Engages directly with policymakers to shape battery regulation.

**Key Activities & Initiatives:**

- Industrial investment projects
- Training programs and skills development
- Support for battery regulation and supply chain resilience

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## ESIA – European Semiconductor Industry Association

**Sector:** Cross-sector

**Description:** ESIA represents the semiconductor industry in Europe, including companies involved in design, manufacture, and research of microelectronics.

**Mission & Vision:** To foster a globally competitive European semiconductor industry that drives innovation, sustainability, and digital transformation.

**Structure & Membership:** Part of DigitalEurope; represents major European semiconductor companies and national industry associations.

**Role in the European Ecosystem:** Key player in the Chips Act and Europe's ambition to reach 20% global chip production by 2030. Provides technical expertise and policy recommendations to the European Commission.

**Key Activities & Initiatives:**

- Advocacy and representation at EU level
- Participation in IPCEIs (Important Projects of Common European Interest)
- Coordination with the European Chips Act implementation team

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## EPCIA – European Passive Components Industry Association

**Sector:** Energy-Intensive Industries

**Description:** EPCIA represents the European manufacturers of passive electronic components such as capacitors, resistors, and inductors. These components are essential for all electronic circuits and are key to enabling clean and digital technologies.

**Mission & Vision:** To support a strong and competitive European passive components industry that ensures technological sovereignty and supply chain resilience.

**Structure & Membership:** Part of the European Semiconductor Industry Association (ESIA); includes companies involved in R&D, manufacturing, and application of passive components across Europe.

**Role in the European Ecosystem:** Ensures the representation of passive components in EU industrial policy and digital/green transition strategies, particularly in the context of mobility and renewable energy technologies.

**Key Activities & Initiatives:**

- Monitoring global market trends and capacity gaps
- Policy engagement on critical raw materials and energy efficiency
- Standardization and technical harmonization efforts

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## CRMA – Critical Raw Materials Alliance

**Sector:** Energy-Intensive Industries

**Description:** The CRMA advocates for the secure and sustainable supply of critical raw materials (CRMs) in Europe. It represents a broad coalition of stakeholders involved in mining, processing, and recycling of materials critical for high-tech and green applications.

**Mission & Vision:** To reduce Europe's dependency on imported CRMs by strengthening domestic capacities and fostering responsible international partnerships.

**Structure & Membership:** Open to industrial players, associations, academic institutions, and public bodies working on or affected by CRM supply chains. Closely aligned with the EU's Critical Raw Materials Act.

**Role in the European Ecosystem:** Provides input into EU strategies on raw materials, battery regulation, and green technologies. Acts as a platform for exchange, research collaboration, and policy shaping.

**Key Activities & Initiatives:**

- Identification of supply chain risks
- Support for innovation in material substitution and recycling
- Policy advocacy and communication

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## EuMaT – European Technology Platform for Advanced Engineering Materials and Technologies

**Sector:** Energy-Intensive Industries

**Description:** EuMaT is a technology platform promoting research and innovation in advanced engineering materials, including metals, ceramics, polymers, and composites crucial for industrial competitiveness.

**Mission & Vision:** To align stakeholders in developing innovative material solutions that meet sustainability, durability, and performance requirements across sectors like energy, transport, and construction.

**Structure & Membership:** Comprises representatives from industry, research institutions, and public authorities. Operates as a European Technology Platform (ETP) recognized by the European Commission.

**Role in the European Ecosystem:** Supports Horizon Europe missions and partnerships by providing strategic research agendas and aligning EU-funded R&I with industry needs.

**Key Activities & Initiatives:**

- Development of Strategic Research Agendas (SRAs)
- Participation in EU projects and clusters
- Organisation of expert workshops and foresight activities

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## EAA – European Aluminium Association

**Sector:** Energy-Intensive Industries

**Description:** EAA is the voice of the entire aluminium value chain in Europe, from primary production to recycling. Aluminium is a strategic material for lightweight mobility, packaging, and renewable energy technologies.

**Mission & Vision:** To advocate for policies that promote the sustainable growth of the aluminium industry in Europe and ensure its global competitiveness.

**Structure & Membership:** Represents over 80 companies and national associations. Organised in thematic committees and working groups addressing sustainability, trade, energy, and innovation.

**Role in the European Ecosystem:** Engages with EU decision-makers on carbon policies, trade defense, and circular economy. Promotes aluminium as an enabler of climate neutrality and industrial leadership.

**Key Activities & Initiatives:**

- Policy dialogue on carbon leakage and energy costs
- Aluminium recycling and circularity campaigns
- Support for innovation in low-carbon production

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## ELCA – European Lightweight Cluster Alliance

**Sector:** Cross-sector

**Description:** ELCA is a European network of clusters focused on lightweight materials and technologies. It aims to accelerate industrial uptake of lightweight solutions across mobility, construction, and energy sectors.

**Mission & Vision:** To enhance cross-border collaboration and technology transfer in lightweighting, reducing environmental impact while maintaining performance.

**Structure & Membership:** Consists of regional clusters, innovation hubs, and industrial stakeholders. Functions as a platform for joint EU projects and interregional cooperation.

**Role in the European Ecosystem:** Contributes to the twin transition by enabling lightweight designs that reduce energy consumption and emissions in key industrial applications.

**Key Activities & Initiatives:**

- EU project participation (Horizon, Interreg, etc.)
- Development of a pan-European innovation agenda
- Matchmaking and best-practice exchange

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## ETP SMR – European Technology Platform on Sustainable Mineral Resources

**Sector:** Energy-Intensive Industries

**Description:** ETP SMR was created to advance R&I in sustainable mineral resource extraction and processing. It brought together stakeholders to shape the EU's research agenda on primary and secondary raw materials.

**Mission & Vision:** To ensure that Europe has access to sustainable, efficient, and secure mineral resources through innovation and technology leadership.

**Structure & Membership:** Included universities, research centers, industry, SMEs, and public bodies. Though less active today, its strategic outputs still guide EU raw materials policy and funding.

**Role in the European Ecosystem:** Helped align Horizon 2020 and Horizon Europe topics with industry needs in mining and processing. Laid groundwork for initiatives like ERMA and EIT RawMaterials.

**Key Activities & Initiatives:**

- Strategic Research Agenda for Sustainable Mineral Resources
- Input to EU innovation and circular economy policy
- Cross-sectoral workshops and foresight

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## EIT RawMaterials

**Sector:** Energy-Intensive Industries

**Description:** EIT RawMaterials is a Knowledge and Innovation Community (KIC) funded by the European Institute of Innovation and Technology. It fosters innovation across the entire raw materials value chain—from exploration to recycling.

**Mission & Vision:** To secure a sustainable raw materials supply by driving innovation, education, and entrepreneurship in Europe.

**Structure & Membership:** Composed of over 300 partners including industries, research institutions, and universities. Operates six Innovation Hubs across Europe.

**Role in the European Ecosystem:** Provides funding, acceleration, and networking to support EU autonomy in critical raw materials. Supports RIS regions and integrates education with innovation.

**Key Activities & Initiatives:**

- Start-up accelerator and scale-up support
- RawMaterials Academy for education and skills
- Flagship projects in circularity, recycling, and digitalization

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

**Sector:** Energy-Intensive Industries

**Description:** Euromines represents European mining companies and associations, promoting sustainable and responsible mineral extraction in Europe.

**Mission & Vision:** To strengthen Europe's raw material supply security while ensuring high environmental and social standards in mining.

**Structure & Membership:** Includes national mining associations and companies engaged in extraction and processing across Europe. Acts as a key dialogue partner for EU institutions.

**Role in the European Ecosystem:** Advocates for mining's role in the Green Deal, CRM Act, and industrial strategy. Promotes investment, skills, and permitting streamlining.

**Key Activities & Initiatives:**

- Policy engagement on permitting, taxonomy, and ESG
- Statistical and market analyses
- Contribution to sustainability frameworks

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## SUSCHEM – European Technology Platform for Sustainable Chemistry

**Sector:** Energy-Intensive Industries

**Description:** SUSCHEM is a platform advancing research and innovation in sustainable chemistry. It addresses industrial decarbonization, clean processes, and circular material flows.

**Mission & Vision:** To position sustainable chemistry as a driver of EU competitiveness and environmental transition.

**Structure & Membership:** A collaboration between Cefic, academia, SMEs, and national platforms. Structured around working groups and thematic focus areas.

**Role in the European Ecosystem:** Shapes EU research agendas and feeds into Horizon Europe, Clean Hydrogen Partnerships, and low-carbon industrial roadmaps.

**Key Activities & Initiatives:**

- Development of Strategic Innovation and Research Agendas (SIRA)
- Contribution to EU Missions and PPPs
- Networking between science and industry

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## ECRN – European Chemical Regions Network

**Sector:** Energy-Intensive Industries

**Description:** ECRN is a network of European regions with a strong chemical industry presence. It aims to ensure regional voices influence EU policy and support sustainable development.

**Mission & Vision:** To foster interregional cooperation and improve the competitiveness of the European chemical industry through regional support and smart specialization.

**Structure & Membership:** Comprises regional governments and development agencies across Europe. Cooperates closely with Cefic and EU institutions.

**Role in the European Ecosystem:** Connects regional policy with EU strategies (Green Deal, REPowerEU, CRMs) and supports SMEs and clusters in transition pathways.

**Key Activities & Initiatives:**

- Advocacy for regional innovation needs
- Best practice exchange among chemical regions
- Coordination of EU-funded projects (e.g. Interreg, Horizon)

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## Alliance for Industry of the Future

**Sector:** Cross-sector (Spans manufacturing, energy-intensive industries, and mobility, especially in context of Industry 4.0 and digital/green transition.)

**Description:** The Alliance for Industry of the Future is a strategic coalition that supports the digital and green transformation of Europe's industrial base through advanced technologies, smart manufacturing, and decarbonisation.

**Mission & Vision:** To drive Europe's transition toward more sustainable, digitally integrated, and globally competitive industrial systems.

**Structure & Membership:** Often includes public-private stakeholders such as industrial alliances, national industry associations, technology platforms, and innovation clusters. Can be linked to national Industry 4.0 initiatives.

**Role in the European Ecosystem:** Supports the implementation of the EU's twin transition (green and digital) across all industrial ecosystems, with a particular focus on manufacturing and process industries.

**Key Activities & Initiatives:**

- Support for adoption of AI, robotics, and clean energy solutions
- Development of industrial data spaces and digital twins
- Policy input on decarbonisation pathways and skills

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## EFFRA – European Factories of the Future Research Association

**Sector:** Cross-sector (Focuses on manufacturing innovation relevant to energy-intensive industries, mobility, and aerospace components.)

**Description:** EFFRA is a non-profit association promoting the development of advanced manufacturing technologies through public-private partnerships like "Made in Europe."

**Mission & Vision:** To enable smart, sustainable, and competitive European manufacturing through collaborative R&I.

**Structure & Membership:** Represents over 150 members including manufacturers, SMEs, research organizations, and technology providers. Coordinates with the European Commission and other PPPs.

**Role in the European Ecosystem:** Acts as the private side of the Made in Europe partnership under Horizon Europe, with a focus on innovation and uptake of advanced manufacturing.

**Key Activities & Initiatives:**

- Strategic Research and Innovation Agenda (SRIA)
- EU project monitoring (EFFRA Innovation Portal)
- Cross-industry roadmapping

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## European Clean Hydrogen Alliance

**Sector:** Cross-sector (Applies to chemicals, steel, cement, mobility, and aviation — all part of Energy-Intensive Industries and Mobility ecosystems.)

**Description:** An official EU-led industrial alliance supporting the deployment of clean hydrogen technologies across Europe, especially in hard-to-abate sectors like steel, chemicals, and transport.

**Mission & Vision:** To make clean hydrogen a cornerstone of Europe's climate-neutral energy system by 2050.

**Structure & Membership:** Over 1,000 stakeholders from industry, research, finance, and government. Coordinated by the European Commission.

**Role in the European Ecosystem:** Mobilizes investment, innovation, and policy alignment in clean hydrogen infrastructure and usage, complementing REPowerEU and Fit for 55.

**Key Activities & Initiatives:**

- Hydrogen project matchmaking and tracking
- Investment agenda and financing support
- Policy coordination and permitting acceleration

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## Alliance for Zero-Emission Aviation

**Sector:** Aerospace & Defence (With interfaces to clean energy and mobility policy, but core focus remains aviation technology.)

**Description:** This European Commission-led alliance supports the development of hydrogen and electric aircraft technologies and infrastructure, aiming to decarbonize the aviation sector.

**Mission & Vision:** To enable the deployment of zero-emission aircraft by 2035 through coordinated industry, R&D, and regulatory actions.

**Structure & Membership:** Open to aircraft manufacturers, airports, fuel suppliers, regulators, and research organizations.

**Role in the European Ecosystem:** Drives cross-sector collaboration between aerospace, energy, and transport players. Supports the transition of aviation to low-carbon propulsion systems.

**Key Activities & Initiatives:**

- Roadmaps for zero-emission aviation
- Infrastructure and airport readiness studies
- Funding and project coordination

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## European Solar Photovoltaic Industry Alliance

**Sector:** Cross-sector (Mainly energy-focused, but highly relevant for Energy-Intensive Industries, industrial decarbonization, and clean technology manufacturing.)

**Description:** An official EU industrial alliance aiming to re-establish a strong European PV manufacturing value chain and reduce dependency on foreign suppliers.

**Mission & Vision:** To scale up European PV production to 30 GW by 2025, supporting the EU's climate and energy security goals.

**Structure & Membership:** Includes manufacturers, developers, research organizations, and investors from the solar value chain.

**Role in the European Ecosystem:** Plays a key role in the REPowerEU plan, aiming to accelerate the deployment of solar energy and strengthen supply chain resilience.

**Key Activities & Initiatives:**

- Support for PV gigafactories
- Investment matchmaking and policy input
- Skills development and industrial innovation

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## European Alliance for Industrial Data, Edge and Cloud

**Sector:** Cross-sector

**Description:** This EU-led alliance fosters the development of next-generation cloud and edge technologies within Europe, ensuring sovereignty, competitiveness, and resilience in data infrastructure.

**Mission & Vision:** To create a federated, secure, and sustainable cloud and edge ecosystem supporting industry, public services, and innovation.

**Structure & Membership:** Includes cloud providers, software vendors, industry users (e.g., automotive, energy), national governments, and research institutions.

**Role in the European Ecosystem:** Supports all industrial ecosystems through digital infrastructure, especially Mobility, Energy-Intensive Industries, and Aerospace where edge computing, data sharing, and industrial cloud are key.

**Key Activities & Initiatives:**

- Coordination of cloud standardisation
- Joint investment in sovereign cloud technologies
- Support for industrial data spaces and GAIA-X initiatives

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## Renewable and Low-Carbon Fuels Value Chain Industrial Alliance

**Sector:** Mobility, Transport & Automotive

**Description:** A European Commission-led alliance advancing the development and scale-up of renewable and low-carbon fuels (RLCFs), especially for sectors where direct electrification is not viable.

**Mission & Vision:** To decarbonize transport through renewable and synthetic fuels, biofuels, and hydrogen-derived alternatives.

**Structure & Membership:** Open to fuel producers, technology providers, OEMs, ports, logistics companies, and researchers.

**Role in the European Ecosystem:** Targets heavy-duty, maritime, and aviation transport decarbonization — a strategic priority within the Mobility, Transport & Automotive ecosystem.

**Key Activities & Initiatives:**

- Investment mapping and project coordination
- Policy input on incentives and mandates
- Support for R&I and infrastructure rollout

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## Industrial Alliance on Processors and Semiconductor Technologies

**Sector:** Cross-sector

**Description:** This alliance boosts Europe's capabilities in microelectronics and semiconductors, key enablers for digitalisation across all sectors including mobility, aerospace, and industrial automation.

**Mission & Vision:** To ensure EU leadership in chip design and manufacturing and secure supply chains for strategic industries.

**Structure & Membership:** Includes major semiconductor companies, users in automotive and aerospace, research institutions, and public authorities.

**Role in the European Ecosystem:** Strategic for digital resilience across ecosystems — notably Mobility (automotive chips), Aerospace (avionics), and Energy-Intensive Industries (process automation).

**Key Activities & Initiatives:**

- Chips Act implementation support
- Coordination of public and private investment
- Development of design and pilot production capacities

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## ESTEP – European Steel Technology Platform

**Sector:** Energy-Intensive Industries

**Description:** ESTEP promotes cooperative research and innovation for sustainable steel production, a key pillar of Europe's heavy industry.

**Mission & Vision:** To advance low-carbon, digital, and circular steelmaking through innovation and collaboration.

**Structure & Membership:** Includes major steel producers, universities, RTOs, technology providers, and the European Steel Association (EUROFER).

**Role in the European Ecosystem:** A core body for the Energy-Intensive Industries ecosystem, supporting the steel sector's transition aligned with EU climate goals.

**Key Activities & Initiatives:**

- Horizon Europe project coordination
- Strategic Research Agenda (SRA)
- Inputs to Fit-for-55, ETS, and CBAM policy debates

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## A.SPIRE

**Sector:** Energy-Intensive Industries

**Description:** A.SPIRE manages the Processes4Planet partnership under Horizon Europe, focusing on sustainable and circular process industries.

**Mission & Vision:** To enable climate-neutral and circular process industries by 2050 through innovation and systems integration.

**Structure & Membership:** A private-public partnership involving sectors like chemicals, steel, cement, ceramics, and engineering technology providers.

**Role in the European Ecosystem:** Represents the R&I interests of the EU's process industries, central to Energy-Intensive Industries, especially in decarbonisation.

**Key Activities & Initiatives:**

- Processes4Planet implementation
- Technology roadmapping and funding alignment
- Cross-sector industrial symbiosis promotion

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## MMTA – Minor Metals Trade Association

**Sector**: Energy-Intensive Industries

**Description**: MMTA is an international trade association dedicated to the minor metals sector, focusing on trade, production, recycling, and responsible sourcing.

**Mission & Vision**: To represent and support companies involved in the global minor metals industry, promoting ethical sourcing, transparency, and innovation.

**Structure & Membership**: Open to producers, traders, processors, and recyclers of minor metals from around the world, with a strong network across Europe and globally.

**Role in the European Ecosystem**: Supports critical raw materials supply and resilience for sectors such as steel, electronics, and advanced manufacturing.

**Key Activities & Initiatives**:

- Annual international conference and networking events
- Advocacy on critical raw materials policy
- Market intelligence and best practice sharing
- Engagement in EU CRM-related dialogues and alliances

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## Rail.S – Railway Industry Cluster Saxony

**Sector**: Mobility, Transport & Automotive

**Description**: Rail.S is a regional innovation cluster promoting rail technology and sustainable transport solutions in Saxony and beyond.

**Mission & Vision**: To strengthen the competitiveness of rail industry stakeholders through innovation, collaboration, and market access.

**Structure & Membership**: Composed of SMEs, large companies, research institutions, and municipalities in the rail and mobility sector.

**Role in the European Ecosystem**: Supports the green and digital transformation of rail mobility, contributing to the EU's transport decarbonisation agenda.

**Key Activities & Initiatives**:

- Innovation projects on smart rail systems
- Cooperation in Horizon Europe and ERDF projects
- Regional policy advocacy and European networking
- Talent development and skills programmes

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## DECHEMA – Society for Chemical Engineering and Biotechnology

**Sector**: Energy-Intensive Industries

**Description**: DECHEMA promotes science and technology in chemical engineering, biotechnology, and environmental protection across academia and industry.

**Mission & Vision**: To support the advancement of sustainable technologies in the process industries and facilitate cross-sector collaboration.

**Structure & Membership**: Includes individual experts, research institutions, and companies working in chemical engineering, biotech, and industrial processing.

**Role in the European Ecosystem**: Key actor in promoting low-carbon industrial processes, CCU technologies, and biotech-driven material innovation.

**Key Activities & Initiatives**:

- Organisation of ACHEMA, Europe's largest process industry fair
- Coordination of R&I platforms (e.g., SusChem Germany)
- Expert groups and white papers on emerging technologies
- Policy and research input for EU green industrial strategy

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## UVMB – Association of the Construction Materials Industry

**Sector**: Energy-Intensive Industries

**Description**: UVMB represents companies involved in the extraction and processing of mineral construction materials in Eastern Germany.

**Mission & Vision**: To advocate for sustainable and competitive framework conditions for construction material producers and recyclers.

**Structure & Membership**: Mainly composed of SMEs and larger producers of building materials such as gravel, sand, concrete, and cement.

**Role in the European Ecosystem**: Supports the circularity and decarbonisation of construction materials within the energy-intensive sector.

**Key Activities & Initiatives**:

- Dialogue with German and EU policymakers
- Data collection on mineral resource use
- Circular economy initiatives in construction
- Participation in sustainability working groups

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## Bundesverband Geothermie – Federal Association for Geothermal Energy

**Sector**: Cross-sector

**Description**: The association promotes the use and development of geothermal energy in Germany and Europe, covering both shallow and deep geothermal systems.

**Mission & Vision**: To position geothermal energy as a key enabler of a sustainable, carbon-neutral heating and electricity system.

**Structure & Membership**: Comprises utilities, project developers, equipment manufacturers, municipalities, and research institutions.

**Role in the European Ecosystem**: Provides a stable and renewable energy source for industrial processes, buildings, and mobility infrastructure.

**Key Activities & Initiatives**:

- Technical and legal guidance for geothermal deployment
- Annual Geothermal Congress and industry events
- Cooperation with EU geothermal platforms and projects
- Advocacy for integrating geothermal in EU energy policy

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## Table: Overview of European Umbrella Organisations Across Industrial Ecosystems

| Organisation | Ecosystem | Contact Email | Website |
|---|---|---|---|
| Chemical Industry Association | Chemical | | https://www.vci.de/startseite.jsp |
| European Chemical Industry Council | Chemical | | https://cefic.org/ |
| EuPC - European Plastics Converters | Cross-sectoral | info@eupc.org | www.plasticsconverters.eu |
| Eurometaux - European Association of Metals | Cross-sectoral | eurometaux@eurometaux.be | www.eurometaux.eu |
| ERTMA - European Rubber Tyre Manufacturers Association | Cross-sectoral | info@etrma.org | www.etrma.org |
| Eurofer - European Steel Association | Cross-sectoral | mail@eurofer.eu | www.eurofer.eu |
| EPMF - European Precious Metals Federation | Cross-sectoral | info@epmf.be | www.epmf.be/ |
| ERMA - European Raw Materials Alliance | Cross-sectoral | communications@eitrawmaterials.eu | www.erma.eu |
| ALLPROS.eu - Secretariat for the European Alliance on processors and semiconductors tecnologies | Cross-sectoral | | www.allpros.eu |

| | | | |
|---|---|---|---|
| EBA250 - European Battery Alliance | MTA | | www.eba250.com |
| ESIA - European Semiconductor Industry Association | Cross-sectoral | | www.eusemiconductors.eu/esia |
| EPCIA - European Passive Components Industry Association | Cross-sectoral | info@epcia.org | www.eusemiconductors.eu/epcia |
| CRMA - Critical Raw Materials Alliance | Cross-sectoral | info@crmalliance.eu | www.crmalliance.eu |
| EuMaT - European Technology Platform on Advanced Engineering Materials and Technologies | Cross-sectoral | | www.eumat.eu |
| EAA - European Aluminium Association | Cross-sectoral | info@european-aluminium.eu | www.european-aluminium.eu |
| ELCA - European Lightweight Cluster Alliance | MTA, A&D | communication@elcanetwork.eu | www.elcanetwork.eu |
| ETP SMR - European Technology Platform on Sustainable Mineral Resources | Raw Materials | info@eurogeosurveys.org | https://www.etpsmr.org |
| MMTA - Minor Metal Trade Association | Raw Materials | https://mmta.co.uk/contact/ | https://mmta.co.uk |

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| | | | |
|---|---|---|---|
| Rail.S | MTA | info@rail-s.de | https://rail-s.de/en/ |
| DECHEMA - Network for chemical engineering and biotechnology | Chemical | https://dechema.de/en/kontakt_en.html | https://dechema.de/en/ |
| UVMB - Network for building materials | Raw Materials | Leipzig@uvmb.de | https://www.uvmb.de/de/startseite.html |
| Federal association for geothermal | Energy | info@geothermie.de | https://www.geothermie.de/aktuelles/nachrichten |
| EIT Raw materials | Raw Materials | info@eitrawmaterials.eu | https://eitrawmaterials.eu |
| Euromines | Raw Materials | secretariat@euromines.be | https://euromines.org |
| SUSCHEM - European Technology Platform for Sustainable Chemistry | Chemical | suschem@suschem.org | https://suschem.org |
| ECRN - European Chemical Regions Network | Chemical | ecrn@ecrn.net | https://ecrn.net |
| Alliance for Industry of the Future | Cross-sectoral | | http://www.industrie-dufutur.org/ |
| EFFRA - European Factories of the Future Research Association | Cross-sectoral | info@effra.eu | https://www.effra.eu/ |

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| | | | |
|---|---|---|---|
| European Clean Hydrogen Alliance managed by the EC | | GROW-HYDROGEN-PLATFORM@ec.europa.eu | https://single-market-economy.ec.europa.eu/industry/industrial-alliances/european-clean-hydrogen-alliance_en |
| Alliance for Zero-Emission Aviation managed by the EC | | DEFIS-AZEA@ec.europa.eu | https://defence-industry-space.ec.europa.eu/eu-aeronautics-industry/alliance-zero-emission-aviation_en |
| European Solar Photovoltaic Alliance managed by the EC | | EC-solar-alliance@ec.europa.eu | https://single-market-economy.ec.europa.eu/industry/industrial-alliances/european-solar-photovoltaic-industry-alliance_en |
| European Alliance for Industrial Data, Edge and Cloud managed by the EC | | EU-CLOUD-ALLIANCE@ec.europa.eu | https://digital-strategy.ec.europa.eu/en/policies/cloud-alliance |
| Renewable and Low-Carbon Fuels Value Chain Industrial Alliance managed by the EC | | MOVE-RLCF-ALLIANCE-SUPPORT-TEAM@ec.europa.eu | https://transport.ec.europa.eu/transport-themes/clean-transport/alternative-fuels-sustainable-mobility-europe/renewable-and-low-carbon-fuels-value-chain-industrial-alliance_en |
| Industrial Alliance on Processors and Semiconductor Technologies managed by the EC | | EU-semiconductors-Alliance@ec.europa.eu | https://digital-strategy.ec.europa.eu/en/policies/alliance-processors-and-semiconductor-technologies |
| ESTEP - European Steel Technology platform | Cross sectoral | | https://www.estep.eu/ |

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|---|---|---|---|
| A.SPIRE | Cross sectoral | | https://www.aspire2050.eu/aspire/the-association |

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