



SEAS AT RISK

PowerShift

Consultancy: Decarbonising Road Transport Beyond Mining-Intensive Pathways (Research Report)

Terms of Reference

March 2025

1. Background

Critical raw materials (CRMs) have rapidly moved to the **centre of European policymaking**. Across policy debates, access to CRMs is increasingly framed as indispensable for achieving climate neutrality, strengthening defence readiness, ensuring industrial competitiveness and advancing strategic autonomy. This framing has intensified **political pressure to expand mining** activities globally, including in environmentally and socially sensitive areas on land and in the deep sea. At the same time, the dominant policy narrative treats rising material demand and the resulting expansion of mining as largely inevitable.

Private transport is among the most resource- and carbon-intensive systems of modern life. The global car fleet is projected to double by 2040, and the transition to electric mobility is driving a sharp increase in mineral demand. In Europe, the automotive sector is already one of the largest and fastest-growing consumers of CRMs. Passenger cars account for roughly 70% of passenger transport activity, underscoring the central role of the car-based mobility model.

Yet, the decarbonisation debate for road transport remains largely confined to **electrification - a technical shift that leaves the car-centric system structurally unchanged** while intensifying material demand. This reflects a broader climate policy bias towards supply-side solutions. As a result, demand-side strategies - such as reducing mobility needs, shifting transport modes, redesigning infrastructure and promoting shared and smaller vehicles - remain underdeveloped in EU policy discussions. However, these approaches offer substantial **untapped potential to reduce both emissions and material use** within the timeframe required to address the climate emergency. Emerging research indicates that Europe's future demand for critical raw materials in road transport is not predetermined, but shaped by policy choices.

To address this gap, SOMO and Seas At Risk, as part of the EU Raw Materials Coalition, are commissioning a research report that consolidates and critically assesses existing evidence on reducing mineral demand for personal road transport and, crucially, identifies actionable EU policy pathways for implementation.

2. Purpose of the assignment

The purpose of this consultancy is to produce an analytical report that responds to the following questions:

1. **To what extent can the decarbonisation of road transport in the EU be achieved with significantly lower demand for battery metals** - in particular cobalt, copper, manganese and nickel - under current EU policy frameworks and mobility trends?
2. **What are the structural drivers of projected battery-metal demand in the EU road transport sector**, and how are these reinforced or mitigated by existing EU policies?
3. **Where do current EU policy frameworks fall short in enabling demand reduction of battery metals in road transport**, and what policy gaps or contradictions can be identified?
4. **Which concrete EU-level reforms or existing implementation pathways would be required to align road-transport decarbonisation with substantial reductions in battery-metal demand**, while maintaining climate targets and mobility access?
5. **What combinations of demand-side, modal-shift, vehicle-right-sizing, circularity, and other industrial policy measures would provide the most credible pathway to decarbonise road transport with lower battery-metal intensity?**

In responding to these research questions, the study has two blocks of work.

1. **Consolidate and critically assess existing evidence on transformative demand-reduction strategies for road transport in the EU.**

The consultant will review academic literature, modelling studies, and policy analyses addressing battery-metal demand-reduction strategies for road transport in the EU (particularly for passenger car road transport). This work might include reviewing modelling studies that do not necessarily target battery metals, but that can extrapolate demand assumptions for such metals. The consultant should critically assess the assumptions underlying both demand-reduction scenarios and dominant business-as-usual projections, highlighting key uncertainties and the structural drivers of battery demand. The analysis should identify which transformative demand-side measures show the most robust and consistent potential to reduce CRM demand in the EU across a range of scenarios.

As transformative demand-side measures within this field, we include measures (indicative, not exhaustive) that:

- Reduce vehicle kilometres travelled,
- Promotes modal shift to public transport,
- Expands shared mobility systems, and
- Strengthens active mobility.

The assignment does not require new quantitative modelling.

2. Identify actionable EU policy entry points for 2026–2030.

Based on the evidence review, the consultant will identify which EU policy instruments are capable of operationalising the identified transformative strategies within the current EU legislative cycle (2026–2030)

The analysis should cover:

- EU legislation already in force, where implementation, delegated acts, revisions or national transposition create opportunities for embedding transformative demand-reduction measures; and
- Upcoming legislative initiatives or expected legislative reforms.

Relevant policy files include, but are not limited to:

- Automotive Omnibus / Automotive Package
- Circular Economy Act (CEA)
- CRMA national circularity plans
- ReSource EU framework
- Revision of the Public Procurement Directive
- Net-Zero Industry Act implementation
- EU Battery Regulation implementation
- Ecodesign for Sustainable Products Regulation (ESPR)
- Implementation of TEN-T urban node mobility requirements

3. Deliverable

The consultancy will result in a policy-oriented analytical report of up to 20 pages (final designed version, including figures and references).

The report should:

- Respond comprehensively to the research questions in the assignment above.
- Be written in clear, accessible, and policy-relevant language suitable for EU and Member State policymakers, civil society organisations, and media audiences; technical concepts should be explained concisely and in an understandable manner, avoiding unnecessary jargon while maintaining analytical rigour.
- Use visuals where appropriate (e.g. charts, tables and infographics) to communicate complex information effectively to non-technical audiences;
- Ensure transparency and robustness of sources, with full referencing and clear citation of data, methodologies and external inputs;
- Maintain neutrality and analytical independence, while ensuring that conclusions are evidence-based and policy-relevant; and
- Be delivered in English.

3.1. Process and Timeline

- A detailed outline of the report structure will be submitted for approval at an early stage.
- A first full draft will be submitted for review by an agreed-upon deadline.
- Another round of consolidated feedback will be provided by SOMO and Seas At Risk.
- The third and final version will be submitted no later than 31 August 2026 (earlier submissions are welcome, if possible, from the consultant).

The consultant is expected to work collaboratively with representatives of SOMO, Seas At Risk, and selected members of the EU Raw Materials Coalition. This will include participation in several coordination meetings during the assignment, to be agreed upon.

4. Required expertise

Applicants should demonstrate:

- Proven expertise in EU policy frameworks, particularly in transport, climate, industrial and circular economy policy;
- Strong understanding of mobility systems and transformative demand-side strategies (e.g. modal shift, reduction of vehicle kilometres travelled, shared and active mobility);
- Familiarity with CRM debates, material demand modelling and/or resource governance;
- Experience producing policy-oriented research reports;
- Strong analytical and writing skills, with the ability to translate complex research into clear, accessible and policy-relevant narratives; and
- Experience in analysing EU legislative processes and identifying policy entry points within specific political cycles.

The following will be considered desirable skills:

- Knowledge of EU funding and regulatory instruments relevant to transport and industrial policy;
- Experience working with civil society organisations and/or policy advocacy processes; and
- Ability and willingness to participate in activities to socialise the report once published.

5. Application procedure and remuneration

Interested consultants are invited to submit:

- **CV(s)** highlighting the relevant experience of the people involved;
- A **short technical and financial proposal (maximum 2 pages)** outlining:
 - The proposed methodology and analytical approach, and
 - Timeline for delivery of the final version (final outcome no later than 31 August 2026; earlier submissions are welcome).

- The proposed total budget (including total number of working days and their allocation across the main components of the assignment and day rate(s); and
- Examples of **previous relevant work**.

The budget for this assignment is €15,000 to €20,000. Please note that the proposed offer must include the standard VAT rate of 21%, even if the service provider is located outside the EU.

6. About the commissioners

[Centre for Research on Multinational Corporations \(SOMO\)](#) is an independent research organisation investigating the impacts of multinational corporations and promoting sustainable and equitable economic systems.

[Seas At Risk \(SAR\)](#) is an umbrella organisation of 39 environmental organisations from across Europe, working together to ensure that life in our seas and oceans is abundant, diverse, climate resilient and not threatened by human activities. This project is supported by its policy area of deep-sea mining.

[PowerShift](#) is a Berlin-based non-profit organisation working on trade, raw materials, energy policy and climate justice. It links evidence-based research with strategic advocacy to support a transition toward resource-efficient, climate-compatible and rights-based economic systems.

This project is coordinated within the [EU Raw Materials Coalition](#), a civil society alliance working toward sustainable raw materials policies in Europe.

7. Instruction for application

Please send your proposal to Douwe de Haan ddehaan@seas-at-risk.org by 19 April 2026, 23:59 Brussels time, with the subject line: Tender Research Report.

A response can be expected by April 30.