



Mining in Europe: Current Issues

European association for mining industries,
metal ores and industrial minerals

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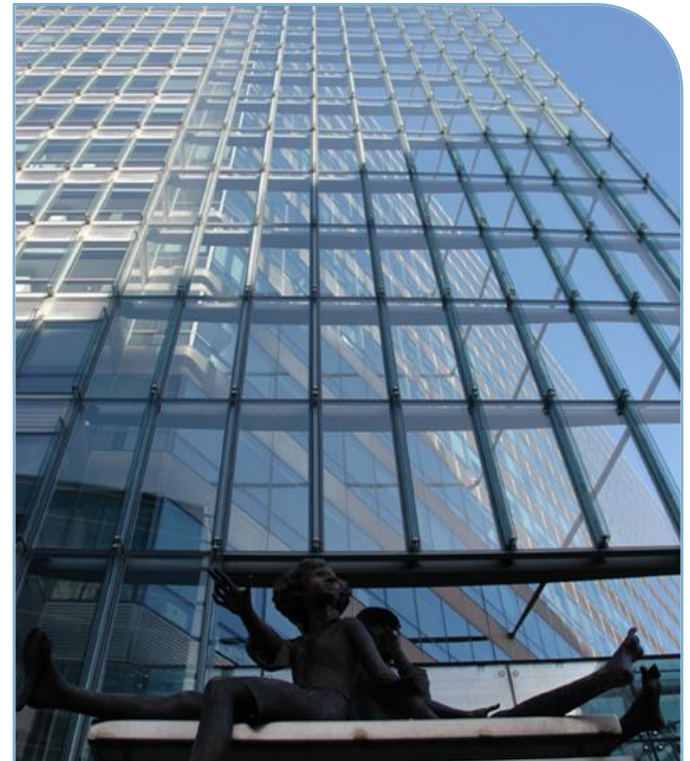
Burgos, October 2016



Euromines activity towards the EU Institutions:



- Monitoring and evaluating EU policies;
- Providing facts to the EU Commission on the issues;
- Preparing Euromines positions on EU proposals of relevance;
- Promoting the sector's contribution to sustainable development;
- Liaising with other associations and sectors to increase leverage;
- Cooperation with the Commission and Member States in organizing events focused on implementation of EU legislation.



Euromines – why we do it



- To provide members with early warnings of policy change.
- To stimulate policy debate, say what's needed and create opportunities to secure what's needed.
- To project, shepherd and maintain the industry's reputation.
- So that members can grow and prosper.



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Vision & Mission

European Mining Context 2015 - 2020

- Economic Political and Social disruption
 - Need for jobs & growth through export
 - Need for regional stability & well-being
- Climate agreement / Coal divestment
 - Energy market & infrastructure re-build
- Demand for sustainable supply/prices
- Demand for greater re-use and recycling
- Demand for greater governance
- EU funding for research & innovation



Euromines Vision & Mission



- **A viable and responsible minerals and metals mining industry providing essential assets to society's sustainable development.**

Euromines' Mission

- to promote a sustainable and prosperous extractive industry in Europe through appreciation of its excellence;
- to serve as a network for cooperation and for the exchange of information throughout the sector;
- to foster contacts with the mining community internationally in order to achieve its objectives;
- to participate in European and international policy-making.



Euromines' Objectives



- To promote mining as a contributor to sustainable development in Europe → achieve broader recognition of the role the industry plays in society.
- To promote the extractive industry towards transnational bodies in Europe as
 - an economically crucial sector,
 - a responsible environmental sector,
 - a responsible employer,
 - an innovative sector,
 - a repository of essential specialist expertise for evidence-based policy-making.
- To deliver Euromines as the premier voice for its membership and the industry in Europe.
- Maximise the positive image of the industry.



Our Key External Messages



RESOURCES

- We strongly believe that Europe has viable mineral resources.

DEMAND

- The demand for raw materials is continuously increasing.

STANDARDS

- Maintain an enabling environment which provides highest standards, excellence and leadership of the European extractive industry.





Delivery



Delivering specialist expertise for evidence-based policy-making



□ H & S

- OSH revision
 - Chemical Agents Directive
 - Carcinogens Directive
 - Physical Agents: Vibrations and Noise, manual handling of loads, electromagnetic fields
 - NEW: Psycho-social issues



2015:

- Cooperation with IMA-Europe and UEPG
 - Reviewing consultant's report
 - Preparing position of SWPEI
 - Preparing position for ACH

2016:

- Analysing Commission's proposal and influencing the legislative proposals

□ REACH and OELs



Cooperation with CII alliance on relationship for REACH and OELs: avoiding authorisation

□ Machinery and Safety



Participating in CENT TC 196 on machinery and safety

□ Traceability of Explosives



Participating in Commission and MS working group on Explosives



Structural matters and image building



- SWPEI* - new mandate to be adopted, proposal made to Advisory Committee
- SWPEI - New nomination of employers representatives will be required once the new mandate has been adopted
- Social Dialogue: Chairmanship for 2016 with Euromines: Vicente Gutierrez
- Euromines Health and Safety Conference in Luxembourg in April 2016
- Website and H & S publication

* *Standing Working Party for the mining & other Extractive Industries*

Keeping loud mining's voice



Policy:

- Critical Raw Materials
- EIP on Raw Materials
- Horizon 2020
- Permitting Issues
- Industrial Policy & Data Needs
- Minerals4EU – Minerals Yearbook and EU Minerals Agency



2015:

- Participation in relevant EU Working Groups
- Privileged input to Criticality methodology
- Privileged input to Raw Materials Scoreboard

2016:

- Updated listing of Critical Raw Materials
- First reporting of Raw Materials Scoreboard



2015: Participation in Advisory Committee, and Foresight workshops, Advisory Board of some projects, ETP SMR research agenda and Commission's funding programmes



2016: Study proposal



2015:

- Set out the need for better data provisions

2016:

- Data acquisition project proposal



2015: Participating in Advisory Committee of project



Promoting our contribution to sustainable development



□ Environment

- Circular Economy
 - Product Environmental Footprint
- Natura 2000 refit and no-net loss of biodiversity
 - Eco-label criterion
- Mine Waste Legislation
 - BAT on mine waste management
 - Inspections
- Water Framework Directive and Priority Substances



2015:

- Inclusion of EU mining in Circular Economy
- Global industry publication on LCA in PEF
- International Workshop on LCA in PEF

2016:

- Discredit use of resource depletion in PEF



2015:

- Participation in Commission working group
- Fixed common Euromines position
- Contributed to CSBI industry guides
- Achieved reversal of Ecolabel criterion

2016:

- Fitness Check outcomes
- Communication on Land as a Resource



2015:

- Defended legal basis of BAT
- Avoided inappropriate inspections Reg.

2016:

- EC/EP studies on implementation
- New EU Guidance on Hazardous Waste



2015 → 2016:

- Joint monitoring research platform (CN)
- Participation in EQS-setting through WG

Promoting mining as an economically crucial sector - 1



- Energy Union



- Promoting sustainable supply of competitive energy
- Research
- Social Dialogue positions on maintaining coal as an option
- Support for subsidies for energy intensive industries in light of unfair competition
- Support for CCS and CCU

- ETS and EU subsidy regulation



- Support for Carbon leakage list (CLL)
- Consultancy study on sectors' eligibility for CLL
- EU subsidy regulation for indirect energy – positioning industry for eligibility

- HLG on energy intensive industries



- Participation in DG Grow HLG and positioning of the industry



Promoting mining as an economically crucial sector - 2



□ A favourable investment climate:

- Availability of skills
- Tax regimes
- Streamlining permitting
- EIP on Raw Materials: innovation and access to funding (Investment facility and Horizon 2020)
- EESC Industrial Roundtables in Member States



- Standardisation of skills in the sector
- Lobbying for adequate transparency of financial reporting
- EC study on permitting in MS – monitoring and influencing
- Lobbying for RTD funding
- Cooperation with EESC to establish industrial roundtables in MS
- Lobbying Cabinet Juncker for EU investment facility for the minerals sector

□ Creating a level playing field:

- China MES and EU anti-dumping/anti-subsidy regulations
- Critical raw materials: regular assessment and methodology
- Material flow analysis of critical raw materials
- Critical raw materials for the defence industry



- Cooperation with the AEGIS alliance on securing level playing field with CHINA
- Strengthening the EU's anti-dumping/anti-subsidy regulation
- Positioning with regard to criticality assessment and policy measures



Highest Standards: Excellence and Leadership



- Different international standards and commitments, certifications and audits on sustainability
 - Conflict Minerals
 - Tax Transparency Reporting
- International Reporting Standards on Reserves and Resources
- H&S
 - ISO and CEN standards on safety of machinery
 - ICMM performance standards: zero accidents
- Environment
 - Lifecycle assessment and PEF methodology standards
 - Monitoring standards of water quality for free cyanide



Communicating with stakeholders

Roundtable Series : 2015



- Organised by the European Economic and Social Committee's (EESC) Consultative Commission on Industrial Change (CCMI) in partnership with Euromines, Euracoal, IndustriAll Europe,
 - Addressing national ministries and authorities, the supply chain partners and other national relevant organisations.
 - **The aim** of the round-tables was to meet the needs of the EC regarding consultation with and participation by civil society and social partners on the implementation of the SIP of EIP on raw materials.
- ≡ Brought together more than **200 participants**.
- ≡ **Publication** "Implementing the EIP on Raw Materials in selected EU Member States" is now available.

Topics addressed in the roundtable discussions included:

- Production, trade and consumption of energy and non-energy raw materials;
- Political, legal, administrative and societal challenges related with the secure access to raw materials from EU sources
- Secondary raw materials and aspects related to the concept of "circular economy";
- Health and Safety issues.

European Association of Mining Industries, Metal Ores & Industrial Minerals



2015 Roundtable discussions

Spain: 3rd March 2015

Slovakia: 17th April 2015

Romania: 4th June 2015

Finland: 7th September 2015



www.euromines.org

Roundtable Series : 2016

- April: Portugal
- May: Ireland
- June: Poland
- November: Czech Republic
- December: Brussels



Projecting the Sector's Image

– focusing on target audience



- Senior regulators and politicians in the extractive industry - relevant jurisdiction
 - Representatives of the EU authorities (European Parliament, European Commission, European Council, Permanent Representatives)
 - Representatives of Member States authorities (Member States Parliaments, other governmental institutions, regional regulators)
- Communities / Neighbours in particular mining regions
- NGOs – acting in the mining relevant issues
- Representatives of customer industries
- Environmental experts and independent experts
- Universities, schools, teachers
- Trade Unions
- Other European associations (IMA, UEPG, Eurometaux etc.)
- Media, international media commentators
- General public



- Organising and participating in Round-table discussions
- Participating in International conferences and events
- Participating in national conferences and events
- Participating in Minerals Days

- Face-to-face meetings
- Position papers
- Stakeholder consultations
- Publications
- Electronic communication - including
 - Euromines External Newsletter
 - Euromines Raw Materials Campaign
 - Social media
- Media Relations – publishing articles

Improving social acceptance: examples



- **General public**
 - Minerals Day
 - Communication campaign: **“Before it’s yours we mine it.”**
- **Employees**
 - Social Dialogue
- **Member States and regional authorities**
 - Project: Cultural heritage and urbanisation
 - Project: Mining regions
- **European Parliament**
 - Meet your decision maker: European Parliament
- **European Commission**
 - PEF
 - H&S performance

Iron | Silica | Aluminium | Aggregates

GERMANY

Deutsche Bahn

According to the London Metal Exchange about 7% of copper is used by the transportation industry and 60% of copper is used in all types of electrical wiring. Because copper does not spark, it is the safest constituent to use for this purpose. Unfortunately the copper cables of railways often get stolen, resulting in delayed trains.

euromines

Before it’s yours, we mine it.
euromines.org

The advertisement features a photograph of a modern glass-fronted building with a Deutsche Bahn tower in the background, situated along a riverbank. The text is overlaid on the image, with the word "GERMANY" in large white letters. The euromines logo and tagline are in the bottom right corner.

A viable EU extractive industry

Ensuring legal compliance and an adequate framework

Ensuring adequate EHS legislation

Improving the competitiveness and securing the markets

Keeping the costs down

Shaping standards – Improving performance

Improving social acceptance



A viable EU extractive industry

We must shape the future of our industry in Europe

Thank you for your kind attention

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