Continued policy support from Brussels has found its way into many Member States’ and industry activities in the past two to three years. Efforts by all parties to raise awareness have given a new stimulus to research and projects that have been ongoing for some time as well as providing the ground for new projects. At the same time many Member States have launched roundtables to discuss the role of raw materials for the reindustrialisation of Europe to bring Europe out of its long economic crisis.

These efforts embrace a wide variety of activities along the value chain and covering many different aspects of the minerals industry. The end of 2014 will see the second conference of the European Innovation Partnership of raw materials, to be held in Italy under the Italian Presidency, and 2015 will see the first reports of the EIP’s commitments. The reports presented here provide a first insight in some of these activities and should be congratulated.

Corina Hebestreit
Director, Euromines
Greek Presidency Athens: The importance of the extractive industry for growth in the EU

Part of the program of the Hellenic Presidency and fully endorsed by the Greek Ministry of Environment and Climate Change this conference aimed at discussing issues such as the definition of the critical economic importance of raw materials to the EU, combined with the high risks associated with their supply.

The conference provided a platform to discuss the development of the second pillar of the Raw Materials Initiative with the sector’s most relevant partners. One of the main axes of the conference was the implementation of EU regulations, the fact that the mining regions have to come up with manageable and competitive and environmentally, socially and economically sustainable solutions. The need for information exchange at European and regional level, the need for closer interaction between companies and regional actors to find solutions for sustainable growth in the regions is very apparent. A different implementation issue discussed was that of the results of the ad hoc working group on exchange of best practices (RMI) on land use planning and permitting procedures. The results of this study include many recommendations on policy and legal framework, information framework between national Geological Surveys, national sustainable mineral policies, land use policy and codes of practice. Many of these issues will be addressed again in the commitments tabled in the context of the EIP on Raw Materials.

As far as the welcome keynote speeches are concerned, we would like to provide you with some important highlights/points. First, Prof. Maniatis, Minister of Environment, Energy and Climate Change, concerning the whole conference and its relevance with the Greek presidency, as a whole, stated:

“This is a very timely Initiative that comes at a moment in which the access to raw materials, guaranteed and undistorted, has become an increasingly important factor for EU industry competitiveness. The Greek Presidency, having established as its priority the fight against the current economic crisis and the search for a new, coordinated EU Industrial Policy, gladly endorses this Conference. Our aim will be that we, together, go forward in the implementation of RMI. One of the basic pillars of this Initiative is to ensure the sustainable production of raw material, coming from European ore deposits. Access to the land sites for the mining industries, in an adequate legal, environmental and economic framework, needs a common effort in the streamlining of the administrative conditions and the benchmarking of better practices to guarantee a sustainable economic development.

I hope therefore, that will be able to make the best of this opportunity, to advance together, in a matter of the utmost importance, for the European Industries”.

In accordance to his current statements about the Greek National Minerals Policy, announced on 29th February 2012, he made the following specifications/specializations:

- An imminent assignment of project on Special Land-Use Planning concerning mineral raw materials;
- A reconstruction of the Greek Institute for Geological Survey;
- Re-estimation of the status and the potential of Public Mining Areas;
- Adoption of a new Law for Exploration and Exploitation of Quarry products, Marbles and Industrial Minerals by the Greek Parliament.
• Establishment of a consulting body with the participation of all the stakeholders, including GMEA, for matters and affairs for the development and utilization of national mineral wealth and total/full inclusion of the national mineral wealth in regional land-use planning blueprints.

Madame Commissioner Damanaki’s speech on behalf of the European Commission, raised the importance of the extractive industry to EU growth and their growing demand. She highlighted the way seabed-mining and underwater extraction could help ensuring higher security and a more sustainable of supply for Europe. She highlighted the importance of the involvement of Greek enterprises in the Innovation Partnership since it is a shared responsibility in the EU.

The President of Euromines, Mr. Rachovides focused on the continued development of the second pillar of the Raw Materials Initiative. He mentioned that there remain a large number of valuable raw material deposits in Europe. Their sustainable exploitation could increase Europe’s supply of mineral resources, help to ease the need for imports from third countries that may apply lower environmental, corporate and social standards, foster the growth of Europe’s Regions as well as provide raw materials that are crucial for the competitiveness of several industries and the development of green technologies.

Mr. Androulakis on behalf of IMA-Europe also had a very interesting approach about critical raw materials. He considers that CRMs provide multiple solutions during the technical innovation process which needs to be an integral part of the European economy and that they could enhance products’ properties. He also raised the issue of the Innovation Partnership and corresponding initiatives in research and innovation. He talked about the raw materials commitment, the industrial minerals road map and the integrative process of the sustainability pillars. He also focused on more resource efficient consumption along the value chain, the importance of recycling and reuse in applications. He finally stated that the EU needed reliable access to minerals and for this aim we should raise awareness and increase cross-functional and cross-sectorial cooperation and alignments.

The first round of the parallel sessions of the conference concerned critical raw materials. Mr. Mattia Pellegrini, Head of Unit in EC DG Enterprise, presented a new list of CRMs. He also made an assessment of components in relation to their economic importance and the relevant supply risks.
The importance of the extractive industry for growth in the EU

The main issue was that Europe, in order to produce its own critical raw materials, required better geological information to be provided by the geological surveys in a single harmonised database. For this reason, the prerequisite for Europe was to intensify and ramp up its efforts in the area of research. The EU should offer incentives for research and legislation determining permitting procedure should be reasonably flexible in order to reinforce exploitation. This is a very important requirement that is missing nowadays. Mr. Tsoukatos, Director for Development of Grecian Magnesite, referred to the inclusion of magnesite products in the “critical” category, expressing the view of the sector that such classifications can be snapshots in time and that under no circumstances should such listings create new policy measures that would turn out to be additional burdens for the EU producers.

Mr. Philippe Gothier (APG Services and Development), in his presentation “Minerals & Metals, an Innovative & Resource Efficient value chain”, talked about the minerals and metals industry, the various sizes and activities of the RM sector, the minerals’ and metals’ contribution to society, the industry achievements, the raw materials’ import dependence, the pressures in the EU economy, the political changes and finally the future objectives and actions.

In the same session, Mr. A. Kefalas, the Vice President of the Greek Mining Association (‘GMEA’), expressed his opinion on the criticality assessment, the reaction of Greece regarding the previous list of critical raw materials, the biggest hurdles to produce CRMs in the EU, the parts of legislation causing major difficulties for developing more CRM mines and finally he communicated his wishes to the policy makers at the EU level.

More specifically, he supported that there was a high overall potential for mining and quarrying in the EU and that the strategic choice was to reduce imported dependency of CRMs. According to his point of view, CRMs are present in Greece, but are still far from being properly fostered. In the inefficiencies of the criticality assessment model he included the aggregation effect of the mega sectors of products assessed, the parameters considered in order to calculate criticality, the use of hard data and indicators. The main challenge was to ensure access to CRMs through land zoning & permitting regulation. Land available for extracting minerals is constantly decreasing thus increasing competition for access to land. One of the major constraints towards effective land use planning, according to his interventions, was the lack of detailed mapping of the location of resources both in Europe and in Greece. The biggest challenge was to move away from legislation that protected the environment in a restrictive manner towards a framework that guided environmental management. A better national legal and regulatory framework was needed, in order to ensure the sustainable development of the extractive industry of CRMs.

In the second session, addressing the work of the ad hoc WG on exchanging best practices speakers and representatives from different Member States exchanged best practices on land use planning and permitting issues. Among the highlights was the importance of the implementation of the announced national policies. It is ultimately the responsibility and the function of Member States to introduce spatial planning which will ensure the access on mineral / ore deposits and the their unimpeded exploitation (second pillar of RMI). The attention was also drawn upon the necessity of communication of information among Member States for implementing best practices of minerals policies. The point of view of GMEA is that there is a need for implementing the announced Greek national minerals policy. It is imperative to pay great attention in special land use planning, in order for Greece not to lose access to their minerals. It is also important to stop the relentless production of additional regulative and restrictive frameworks at EU and Member States level complicating permitting procedures.
In the third session addressing regional development the need to integrate extractive industries to contribute to industrial growth and regional and national wealth was discussed in a broader sense. In this session, Mr. Damoulakis, the mayor of the Island of Milos, talked about the crucial importance balancing development of the whole potential of the island, including tourism and extractive activities. Mr. Van Ermen, executive director from the European Partners for the Environment, instructed about the Covenant 2022 (one of the European Innovation Partnership Raw Materials Commitments) which aims to be a toolkit for implementing sustainable mining and will attempt to provide sustainable mining guidelines.

In the same session, Mr. Faidros, the Chairman of GMEA, talked about Greek mineral raw materials, the manner of investing in the extractive industry today and the prerequisites for an efficient contribution of CRMs in regional development. Finally he noted five examples of regional development in Greece.

Overall the conference came to the conclusion that our future is one where technological advances will lead our industry, where improved policies and regulations will generate growth and will be based on a social consensus for a better future. New EU policy initiatives deserve our participation and support. Innovation, research and resource efficiency are themes at the core of what we do. Access to the land – sites for the mining industries in an adequate legal, environmental and economic framework requires a joint effort in streamlining administrative conditions and benchmarking practices to guarantee a sustainable economic development.

When it comes to the Greek Presidency, having established as its priority the fight against the current economic crisis and the search for a new, coordinated EU industrial policy, gladly endorsed this Conference. The most important aim was that all these aspects would not remain theoretical but would be implemented.

Christos Kavalopoulos
Greek Mining Enterprises Association
Recognizing the importance of mineral resources

Bulgaria

Recognizing the importance of mineral resources

The Mineral Resources Industry is an important strategic sector in the economy of Bulgaria. It is the basis of all other industries and an important factor for economic stability and energy independence in the country.

Bulgaria occupies a leading position in European mining, ranking second in gold and third in copper production on the continent. In terms of the production index per capita, the country complies with the definition of „mining country“, with an indicator above the global average.

The main raw materials extracted in Bulgaria are lignite, lead, zinc, copper and polymetallic ores, gypsum, limestone, bentonite, china clay, quartz sands, fireclay, marble. The number of identified deposits is 595, out of which:
- 206 of metallic minerals;
- 115 of non-metallic minerals;
- 3 of oil and natural gas;
- 51 of natural stone materials;
- 151 of construction materials;
- 69 of solid fuel

80% of mining activities in the country are carried out at surface mines.

Recognizing the important role of the Mineral Resources Industry in the development of the Bulgarian economy and the ensuing responsibilities Bulgarian Mining Chamber created in 2012 the first voluntary Sustainable Mining Standard.

The main objective of the Standard is to contribute to the sustainable development and prosperity of the mining industry in Bulgaria. Additionally the Standard aims at:

- Improving the energy and resource efficiency.
- Minimising environmental impacts.
- Providing maximum socio-economic benefits.
- Establishing long-term, dynamic and effective relationships with stakeholders.
- Strengthening the sector’s reputation.

In 2014, several companies in the sector have already successfully introduced the Standard and the first results will be reported during the forthcoming European mining business forum, held in September 2014.

The European Mining Business Forum is an event held upon the initiative of the Bulgarian Chamber of Mining and Geology since 2010. It is unique for Bulgaria and our country, as one of the European countries with developed mining industry and extensive experience in prospecting and exploration of mineral resources, is hosting it every second year. The patron of the event has traditionally been the Minister of Economy and Energy of Bulgaria.

The purpose of the forum is to create a platform for discussion, exchange of ideas, solutions and best practices on all aspects of sustainable development in the sector. It brings together hundreds of participants: representatives of the leading companies in the sector, public administration at the highest level, representatives of the European institutions, academics and non-governmental organizations in the field of sustainable development and environment, diplomatic representatives.

Among the main topics that the Forum consider are:
- Central and Eastern European countries position in the European mining and mineral processing. Importance and investment opportunities.
- Dialogue with stakeholders. Best practices for cooperation between the mining industry and the public authorities. Strategies for mining industry growth in the region.
- New energy-saving and environmentally friendly technologies in the mining and processing of mineral raw materials. Manpower and business environment in the light of the sustainable development and the new European and National policies in the sector.
- Standard for Sustainable Mining Development.

The next edition of the Forum will be held on 29-30 September 2014 in Plovdiv, Bulgaria.

Ivan Andreev
Bulgarian Chamber of Mining and Geology
Supplying much of Europe’s REE needs

Promising Swedish deposits

The supply uncertainty experienced by consumers of critical metals has been on the public and political agenda since 2010, when the rare earth element (REE) crisis demonstrated the fragile nature of the current REE supply chain, built as it is upon an unsustainable Chinese monopoly. Continued global political tensions and instability have ensured that the desire for energy and resource independence has remained topical.

Despite reams of articles and recommendations published by governments, academia and industry over the intervening years, there has been little fundamental change with regard to supply options for REE’s, tungsten, tin, tantalum, antimony or platinum group elements (PGE’s) for Western consumers. Such metals, and numerous others, are deemed critical due to the irreplaceable role they play for industry, and the high degree of concentration in the existing supply chain.

Across the Western World, a majority of undeveloped mineral resources lie in the hands of junior exploration companies with no cash flow, that rely on shareholder funds to discover and advance their assets. This system is highly efficient for metals like Cu, Au, Zn or iron for which there are hundreds of producers globally, thousands of undeveloped resources, and broad supply networks with transparent pricing mechanisms. Risk capital flows quickly to projects with the best chance of profitable development, and takeovers by major producers are a regular occurrence, rewarding early stage investors handsomely.

In the critical metals arena, significant resources are geologically scarce, such that countries or regions will have few alternatives from which to choose for domestic critical metal supply. These mineral resources are again concentrated in the hands of junior companies. However, despite the clear economic importance of these metals, the availability of risk capital has been limited. Opaque pricing, market asymmetry, involvement of the Chinese government with centralized control of competitors, and substantial technology hurdles for new participants have limited investor appetite. On this unlevel playing field, government policy is clearly highly relevant to attract and support investment for critical metal development, and appropriate policy can greatly increase the chance of success.

In Europe, manufacturing industries are currently completely dependent on distant suppliers for critical metals. These suppliers may be direct competitors, are often monopolies, are continually prone to manipulation, and include unsustainable environmental or social practices. To counter this monopoly, and provide a sustainable domestic supply option, a range of mineral exploration companies are investing across Europe to discover and develop critical metals projects.
Tasman Metals Ltd is one such company, focused on the traditional mining districts of the Nordic countries and 100% owner of Norra Karr in Sweden, one of the world’s most significant heavy REE deposits. Norra Karr is rich in the most critical REE’s and is able to supply much of Europe’s REE needs for at least 50 years. Unlike many heavy REE deposits, the associated concentrations of radioactive thorium and uranium in Norra Karr are extremely low, greatly facilitating the development of the deposit. A fully integrated European REE supply chain shall remove supply risk, minimise the environmental footprint of mining, eliminate the need for stockpiling, and will allow Sweden and Europe to retake the lead in future REE innovation.

The European Commission and Member States have been significantly less active than most other developed regions in their attempts to attract exploration and ensure its success. In Canada, the government of the Province of Quebec has become a direct investor in companies with critical metal assets, acknowledging the imbalance between the difficult market conditions and the long term benefits a secure project can bring. In Australia, Research and Development rebates extend to exploration investment, and in some areas the State Government co-invests to part-pay for drilling activity. In the USA, the State of Alaska has recently approved debt funding in excess of US$130 million to support the future construction of an REE project, with a view to capturing the downstream benefits to be gained through Alaska’s involvement in emerging and expanding technologies.

China has now recognised that critical metals are key drivers for sophisticated and strong industrial economies, and not commodities to be wasted. Critical metals lie upon the leading edge that will unlock the coming century’s material science, energy and engineering innovations, in areas that cannot yet even be imagined. The supply uncertainty felt by Western companies, and their inability to incorporate critical metals with confidence, is not felt by Chinese competitors, where the most appropriate metals can be used to engineer the best and most efficient solutions. The age of unrestricted access to critical metals is over, and without appropriate planning and the guidance of supportive government policy, countries and their manufacturing industries will not have access to the building blocks for the most forward-looking of technologies.

Mark Saxon
Tasman Metals Ltd
From policy to practice?  
Tungsten in the UK

Recently much has been written and debated about mineral supply policy, particular for important industrial and metal mineral resources (sometimes termed ‘critical minerals’ or ‘strategic minerals’), to the economy of the UK and the EU. Concern as to the future security of commercial supply of such mineral resources is now widely acknowledged. Politicians and the general public may now be aware of the broad resource issues associated with the availability of minerals. These concerns are now the topic of a ‘Policy’ debate within Europe and beyond. As mineral supply policy has effectively been off the agenda of European governments for decades, particularly in the UK, this debate is to be welcomed. However, the question is to what extent this ‘Policy’ debate is helping to resolve supply concerns, specifically for critical minerals as well as for other necessary minerals, as opposed to merely being words that assuage the call for action, but do not actually improve the policy environment.

Construction has recently started at the tungsten deposit at Hemerdon in Devon. With full scale production commencing this time next year, there is every prospect that the UK will become a significant supplier of tungsten to the western world. Hemerdon will produce some 5,000 tonnes of tungsten concentrates, with smaller volumes of tin concentrate, per annum over the next 10-15 years. The fully permitted deposit at Hemerdon is one of the largest proved tungsten deposits in the World, certainly significantly larger than any known potentially commercial deposit in Europe and will meet around 5% of global demand.

Interestingly, this globally and economically significant supply will be provided from an excavation site which is less than 0.5 square kilometres in area, tucked away on the fringe of Dartmoor and within easy access to Plymouth. There are prospects to add significant further reserves to the mine.

Tungsten is of irreplaceable significance for its application as a hard metal in cutting and shaping other metals and materials; in drilling for and excavating other rocks and minerals; and on wearing surfaces. The continued supply of tungsten is therefore essential to enable the provision of other minerals; in manufacturing and therefore all material aspects of our life. Tungsten is considered to be a critical mineral within the terms of the EU14, and now the EU20, and elsewhere in the world, but it might be considered to be an ‘old’ critical mineral because its criticality has been acknowledged for over 100 years and because it is mainly of value in basic engineering and exploration processes, rather than in high tech ‘green’ energy minerals (particularly REEs), where the interest of UK and EU governments now seem almost wholly focussed.

It is thought-provoking that the World class Hemerdon deposit lies a few miles from the internationally important industrial mineral extraction operations in China Clay and ball clay in Devon and in the adjoining counties of Cornwall and Dorset; that there would appear to be a number of metal targets elsewhere in South West England; and that the UK hosts operations and targets for, inter alia, fluorspar, zinc, potash, lithium, tin, etc.
From policy to practice?
Tungsten in the UK

Yet, with all this wealth the UK has no operational ‘minerals policy’, within which further development of these minerals, such as extensions to Hemerdon, can be evaluated. There is a very effective land use planning policy system (which some confuse as a minerals policy), with which mineral proposals must comply; and there are strong environmental controls, now mainly reflecting European origins; but there is in effect no ‘mineral policy’ at a national level providing a framework within which regulation weighs the significance of minerals against other objectives.

This is particularly frustrating because, with the distraction of high tech green minerals, the UK has focussed research and policy on resources it mainly doesn’t have and away from those resources which it is particularly endowed with and where other policy may be shutting down options.

It is also thought provoking that other European countries, notably the Nordic and Iberian nations, but, more particularly Ireland, feature high up the table in the Fraser Institute study in relation to policy climate and the ‘attractiveness’ of their mining policies. The UK isn’t even in the table, despite, as noted above, a more diverse mining industry than Ireland and effectively a similar legal and regulatory regime (the regulatory regime must be similar in impact because the basic substance of EU regulation is common).

Hemerdon has come forward, despite, and not because of, the form of UK minerals policy. This position needs to change if the UK is to maximise the potential of its assets. One cannot put policy into practice if policy doesn’t exist.

John Cowley
Independent mineral development consultant based in the UK
Portuguese Best Practice in land planning and minerals policy

The European Commission selected this year three examples from Portugal to include in a brochure with twenty five good practices cases in Europe in the raw materials sector.

The first Portuguese example relates to the effort by the Government to increase the capacity and effectiveness of land use planning. The goal is that all land use maps include exploration and exploitation areas and areas with potential mineral resources what is already the case for many maps approved since 2004 as a result of meetings between the national mining authority and different entities and stakeholders, dissemination of information and the publication of the “Dictionary on land use plans”, with a common methodology and nomenclature for mineral resources. Overlapping with other activities shall be authorised only if it does not compromise the current and future access to mineral resources. This measure is still ongoing and there are some land use maps that need to be updated according to this plan. It is worthwhile noting that currently the only area in Portugal where no geological activity is allowed is that of the National Park Peneda-Gerês.

The second case selected by the European Commission is the Portuguese National Strategy for Geological Resources – Mineral Resources approved in September 2012. This strategy envisages a redefinition of the State’s role, the revision of the rules of organization and discipline of the activity, the development of knowledge and appreciation of the national potential and its dissemination and promotion and economic, social, environmental and territorial sustainability. Within this strategy, the Government announced this July 2014 the mineral fostering programme for 2014-2020 which includes the creation within a short period of time of a mining one-stop-shop. Said one-stop-shop shall among others serve as the focus point for the investor and establish the internal communications with the different Government entities involved, prepare a guide with all relevant information for the mining investor, foster partnerships with international companies, contact directly with the international players, promote Portugal’s mineral potential and raise awareness on the relevance of the geological resources.

The third and last example from Portugal to be included in the abovementioned brochure is the new royalties’ policy which has already been implemented in recently executed concession agreements and will also be set out in the new base law of geological resources that the Government is preparing.

Until 2007, the royalties in Portugal were used primarily to finance public entities in the area of the geological resources. From 2007 to 2012, royalties were used to finance the same public entities but also to support the rehabilitation of abandoned mining sites.
According to the new policy, up to 25% of the royalties’ amount may be used directly by the concessionaire on social commitment programs and projects. The value of the royalties may be subject to deductions for local, regional or national environmental programs, geological and mining heritage projects, projects proposed by local authorities or even R&D mining projects focused on mineral optimisation of metal recovery. A part of the royalties may also be used for the Geological Resources Fund to be created to support actions on knowledge, conservation and valuing of the Portuguese mining and geological heritage.

Besides the provisions on royalties, the new base law of geological resources shall include mandatory consultations to municipalities and other competent entities on environmental preservation and land planning for all phases of the concession process, publication of the non-binding opinions from those entities and any claims made, a new phase of prior evaluation with a maximum duration of one year to allow research and studies of the existing resources including access to the national archives and collecting of samples from the surface and the possibility of two or more concessionaires joining in a group of concessionaires with a single representative if they have adjacent concessions, belong to the same group or the exploited resources are similar or complementary.

The Government is also preparing the revision of all diplomas applicable to the geological resources particularly to mineral deposits, mineral and geo-thermal resources and spring waters. Measures namely of legislative nature with regard to the aspects highlighted in the mineral fostering programme may eventually also be taken namely related to (1) financing instruments for the whole value chain, (2) fostering knowledge of the country’s geological resources, (3) increasing the number of qualified human resources and available equipment, (4) revising concession and licence procedures, (5) mitigating the effects of bonds and (6) defining the future role of the state owned company EDM.

There has been a clear effort by the Government to adopt measures in line with the best practices throughout the mining industry worldwide and create a favourable environment for investors in the mining sector in Portugal. Hopefully these measures will result in increased investment to this sector.

Fátima Nunes and Ricardo da Mota Veiga
ANIET- Associação Nacional da Indústria Extractiva e Transformadora
From Policy to Practice
The Austrian Minerals Strategy

Austria’s industry is – in many areas - heavily dependent on raw materials. As the limitations of access to raw materials become tighter and tighter – on the world-market as well as from domestic sources within the EU - it becomes more and more important to ensure or at least to improve the supply for the Austrian economy.

Even if the minerals supply for a company as such is the task of the industry, the government can provide for a suitable legal framework and according information about e.g. geology. To mention one example, it can care for the recognition of raw material deposits in land-use planning.

In Austria one overarching tool to reach these goals is the Austrian minerals strategy: The Austrian minerals strategy aims to support a sustainable and secure supply of metals, industrial minerals and commodities for Austrian companies. As such it “implements” the Austrian minerals policy.

As the Raw Materials Initiative of the EU, also the Austrian Minerals Strategy is based on three pillars:

- securing raw materials supply from domestic sources (Austrian Mineral Resources Plan)
- securing raw materials supply from the world-market (raw material partnerships with non-EU-countries)
- promoting resource efficiency (Austrian Action Plan on Resource Efficiency)

As mineral deposits are part of the earth’s crust they might be in conflict with other land uses like living, industry, farming etc. The Austrian Minerals Resources Plan, which has been recognized by the EU as “best practice”, aims to identify zones with mineral occurrences worth to be protected due to their quality and quantity. Then existing no-go areas as housing zones etc. as well as conflict-areas as e.g. Natura2000 areas are excluded. The remaining conflict-free areas are handed over to the regional authorities responsible for land use planning to declare them as raw material safeguarding areas in their land use plans. The Austrian Minerals Resources plan, of course, has to be adapted to new developments accordingly. You can find more detailed information on the Austrian Minerals Resources Plan as well as the plan itself at the webpage of the Federal Ministry of Science, Research and Economy under the following link: http://www.en.bmwf.gv.at/Energy/Seiten/The-AustrianMineralResourcesPlan.aspx.
From Policy to Practice
The Austrian Minerals Strategy

In addition to the external trade negotiations of the EU also Austria is discussing bilateral trade agreements with countries around the world that do have raw materials occurrences or productions that are of special interest for the Austrian industry. Thus, to support also the raw materials supply from the world market.

Furthermore, concerning resource efficiency the Federal Ministry of Agriculture, Forestry, Environment and Water management published in 2012 an „Austrian Action Plan on Resource Efficiency“. This action plan will also be adapted to new developments in the coming years.

To complement these initiatives and to link the various actors in these areas, the Federal Ministry of Science, Research and Economy invited relevant stakeholders in 2012 to the „Austrian Raw Materials Alliance“. The Austrian Raw Materials Alliance is a platform for discussions about the improvement of raw materials access according to the 3 pillars mentioned above. Thus, it aims at reducing import dependency and increasing a sustainable and safe supply of raw materials that are important for the Austrian industry. On the one hand concentrating on special topics, the platform started in 2012 discussing strategies for the recovery of critical raw materials from wastes. The recommendations found for research and development as well as for the regulatory framework have to be implemented now. As one result, a research program called „Production of the Future“ containing resource-related issues has already been developed.

Last but not least the Austrian Raw Material Alliance is also the Austrian mirror working group of the European Innovation Partnership (EIP) on Raw Materials, where the topics of the EIP are discussed with interested stakeholders.

The Austrian minerals strategy is a work in progress that has to be further developed according to the changing situation of access to resources – nationally and internationally. It has to be understood as a tool to implement the EU’s raw materials strategy adapted to the Austrian economy’s needs.

Roman Stiftner
Fachverband Bergwerke und Stahl - Austrian Mining and Steel Association
No Net Loss - Where to Next?

Over the last couple of years, no net loss policy (relating to biodiversity and ecosystems) has gathered ground at EU level. Initiatives in this field include a European Commission Working Group, and a study entitled Policy options for an EU No Net Loss Initiative (published in 2015). The Working Group (which ran in 2012 and 2013) gathered together industry, NGOs and Member State representatives, culminating in the publication of several documents compiling the views of the different stakeholders.

So, where to next? The study mentioned above analyses a variety of policy scenarios which could be considered in an EU initiative to ensure there is no net loss of ecosystems and their services. Further to this, the Commission launched in June a much wider, online stakeholders’ consultation with the ultimate goal of proposing such an initiative by 2015. One of the key points raised by the study, and supported by the majority of stakeholders in the working group, is that policy in this field must apply to all sectors. This is important as it has been recognised by the European Environment Agency that agriculture and fisheries are one of the major drivers of biodiversity loss in the EU.

In addition, other studies have noted that reforms of the Common Agricultural Policy are unlikely to have a positive impact on biodiversity. As a result, CEMBUREAU strongly believes that the scope of the no net loss initiative should apply equally to all to ensure the best possible outcome for biodiversity – as well as a legislative level playing field amongst sectors.

One other element up for consideration is whether such an initiative should cover Natura 2000 areas. Here, the majority of stakeholders share CEMBUREAU’s view that these areas are adequately covered by existing legislation. As such, there is no need to create additional requirements for such areas.
It is also important that any legislation in this field does not interfere with the mitigation hierarchy. Therefore, the combination of EU and Member State legislation should ensure avoidance of impacts and, where impacts cannot be avoided, minimisation and restoration on-site (where this is ecologically viable). Only then should compensation or offsetting of (residual) impacts be considered. Experience has shown that the best method for the cement industry to enhance biodiversity and halt the loss of ecosystem services is through in-situ rehabilitation, rather than through offsets. In fact, ecosystems are often enhanced post-rehabilitation in comparison with the site prior to the initiation of extraction activities. A clear demonstration thereof is the cement industry’s contribution to the EU’s NNL initiative (for more information on the project please visit our case study database: http://www.cembureau.eu/topics/biodiversity/case-studies/list/). Therefore, offsets should only be considered as a last resort to compensate for unavoidable residual impacts in our sector. Also, whilst offsetting may be appropriate for some sectors where it would not be possible to restore biodiversity once restoration is complete, it is clear that more work needs to be done to ensure that any such provisions are sufficiently well designed, robust and developed on a scientific basis.

Stakeholders now have until the end of September to respond to the consultation. As to what the 2015 Commission proposal will contain, only time will tell.

Jessica Johnson
Cembureau
Bringing nature back into the mine

Biodiversity conservation at S&B Milos and Fokis quarries, S&B Industrial Minerals S.A.

The extractive sector is of vital importance for human well-being and growth, as it produces products which cover basic needs of modern society. However, by its nature it affects the environment causing visual disturbance. A core element of S&B’s public environmental policy since 2006 is land reclamation. Conserving and restoring biodiversity constitutes one of the basic targets of rehabilitation processes followed by the Company, as well as development of post mining land uses.

The know-how developed over 35 years of systematic work and continuous research on land rehabilitation in Greece have generated good examples of mine reclamation at S&B’s major extractives areas in Greece, at Milos and Fokis areas. Milos is a small island, distinct with respect to its soil and climate conditions (long drought periods, high temperatures and strong winds), high salinity water, grazing problems, forest fires etc. On the other hand, Fokis is a mountainous area and part of it belongs to pseudo-alpic zone.

Reproducing native or endemic plants is of vital importance for successful quarry rehabilitation and the conservation of biodiversity. Endemic species are exclusively used in restoration works since 2010. Of significance is the reproduction of the rare Acer Heldreich in 2004 and other species from pseudo-alpic zone, the germination success of which reached 90% in field trials. In reclamation works at Milos island, it has been found that only native plants can survive. Native plants are modulated in the specific soil and adverse hot-dry climate conditions and consequently are the only ones that can survive, due to their particular efficiency to stay dormant (hibernate) through summer and thus they need no watering during the 6-months hot-dry period. Some of them are durable in fires and/or high saline water concentration. More than 1,500,000 plant species have been produced so far at the two plant nurseries of S&B located at Fokis and Milos.

Independent studies sponsored by the Ministry of Environment and carried out by the Department of Biology of the University of Athens, has concluded that appropriately designed rehabilitation can contribute to the creation of habitats, suitable even for rare or protected species. At the company’s quarry site (Chivadolimni) at Milos island, the results showed that there was no difference in the number of fauna observed, in comparison to the undisturbed area used as reference. Environmental base studies have been implemented in various areas and further work in that direction is in progress, the target being to document that on cessation of mining activity, following well designed reclamation, native flora and fauna can again populate the mine. The work undertaken may be relevant to assessment against possible no net loss or net gain criteria should they be applied in future.

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