The mining industry of the future

Raw Materials University Day
Mark Rachovides, President Euromines
Athens June 19 2014
Euromines – who we are

• Recognized representative of the European mining industry;

• Service provider to its members with regard to EU policy;

• Network for cooperation and for the exchange of information throughout the sector within Europe;

• Link to contacts with the mining community throughout the world.
Minerals represented in Euromines

- Percentage shares of different minerals represented in Euromines members:

Euromines represents large and small companies and their subsidiaries in Europe and in other parts of the world which provide jobs to more than 350,000 people.

Their activities and operations produce more than 42 different metals and minerals.
Euromines Representativity
Metals & Industrial Minerals

Euromines Representativity in Metals Mining
in % of EU production

Bauxite: 100%
Chromium: 100%
Gold: 100%
Iron Ore: 100%
Silver: 100%
Titanium: 100%
Copper: 95%
Tungsten: 85%
Nickel: 80%
Zinc: 75%
Lead: 55%
Bismuth: 50%

Euromines Representativity in Industrial Minerals
in % of EU production

Barytes: 100%
Potash: 100%
Magnesite: 95%
Bentonite: 65%
Sulphur: 72%
Talc: 54%
Graphite: 50%
Mica: 40%
Salt: 33%
Feldspar: 14%
Kaolin: 13%
Diatomite: 12%
Euromines – what we do

• Define common industry positions and actions.

• Establish constructive dialogue with governmental institutions to ensure early consultation on areas of EU policy affecting the industry, and assert the industry's views and positions.

• Advocate for the industry by promoting the benefits and societal value of both its activities and its products.
Euromines as formal platform

- Euromines provides a formal platform where members can evaluate the impact of European and International policies & legislation on the industry and define common positions & actions.

- **Euromines Committees:**
  - Policy
  - Environment
  - Health & Safety
  - ETS/Energy Committee
  - Communication
  - Gold Mining Assembly
  - Magnesite Producers Assembly
• **European Innovation Partnership (EIP) on raw materials**
  • Strategic Implementation Plan for the EIP on raw materials
  •Competitiveness study, Critical raw materials study

• **Innovation/Research & Technical Development**
  • Horizon 2020
  • Extractive industry as a major contributor to innovation in EU raw materials supply

• **Communication**
  • Improve the image of the industry as more environmentally friendly, trustworthy and innovative
  • Establish and maintain good relationships with target audiences
  • Share Knowledge
  • Further strengthen Euromines as the voice for its membership and for the extractive industry in Europe
Environment
- Biodiversity
- Chemicals Management
- IED Directive (The Industrial Emissions Directive)
- Mine Waste Directive
- Resource Efficiency Indicators
- Water Framework Directive

Energy/ETS
- ETS Carbon Leakage List
- Energy Policy: shale gas and oil
- ETS Directive
- State Aid Guidelines

Health & Safety
- Strategy on Health and Safety 2013 – 2020
- Monitoring of all EU H & S legislation and lobbying

Social Dialogue
- Dialogue with unions on issues of common concern
• **Publications:**
  - Annual Report
  - Profile Brochure
  - Gold Brochure

• **Mining Journal features/articles:**
  - Each year 5 - 6 features/articles

• **Euromines participation (co-organisation) in important events:**
  - 2014: Natural Resources Forum, AIMS 2014 - High Performance Mining, Greek Presidency Conference and many others
Euromines website statistics
Constant growth in number of visitors and visits
Some pages were top ranked in google search

External Newsletter - different topics, issued 4 times per year

Social Media – growing number of followers in all Social Media channels (Twitter, Facebook, LinkedIn, Wikipedia)

Euromines Raw Materials Campaign Website – www.eumining.org
Euromines as a member/partner/supporter

- **ETP SMR** (European Technology Platform on Sustainable Mineral Resources) – its current President Dr Corina Hebestreit appointed member of the Industrial Advisory Group for Horizon 2020.

- **ERAMIN** (Network of Research Ministers on Raw Material Research) launched its first joined call between Member States in 2013 making national RTD funding available and completing the research funded by the Commission.

- One of the big flagship projects of the extractive industry **ProMine** won a prestigious EU prize for best project awarded in Athens this year.

- Ongoing projects such as **I2MINE, EURARE, EUROGEOSOURCE, IMPACTMIN, MINERALS4EU, and POLINARES** will yield more results and can enhance the EU’s competence in mineral raw materials.
Our Key Messages

RESOURCES
• *We strongly believe that Europe has a viable resource base*

DEMAND
• *The demand for raw materials is continuously increasing*

STANDARDS
• *The EU should maintain an enabling environment that provides for achievement of the highest standards in the extractive industries*
Europe is rich in resource! We are a Responsible Source!

Key Mineral Belts and Mineral Deposits of Europe

- Au, K, Sn-W!
- Cu, Zn!
- Zn-Pb, Au!
- Au, Cu, Sn-W!
- Ni-Cu, Fe, Au, Cu, Zn, REE!
- Au, Cu, Li-B, Ni!
- Au, Cu, Zn, Ni, Trona!
- Trona!

[Source: The Natural History Museum, London]
Investment in Europe finally UP!

Investment in Mining 2007 – 2013 (E&MJ)

Source: Raw Materials Group/SNL Metals & Mining.
EU mines are the most efficient in the world

- EU companies are at the forefront of innovation in raw-materials supply
- World renowned development and manufacture of mining and mineral processing equipment
- Competing in a global market through stand-out productivity performance
- Meeting or exceeding the EU’s strict environmental & safety standards
Meeting “base-load” demand

- Upgrading & maintaining infrastructure (health, transport, energy,...)

- Accommodating increased urbanisation

- Deploying new sustainable technologies

- Sharing equitably the benefits of new technologies

- Re-balancing lifestyles and employment across EU regions

The mining industry consistently adds more to proven reserves than it takes away
Any Green Economy still needs Responsible Sourcing

[Source: Aachen University RWTH]
No Growth Without Mining

No mining in Europe

Supply chain for raw materials interrupted

EU downstream industry PARALYSED

These sectors represent:

EU Sectors:
- construction
- chemicals
- automotive
- aerospace
- machinery
- equipment

ECONOMIC GROWTH

No value added €1,324 billion

No jobs, lost expertise, lost export markets (products & services), lost communities, social challenges
Euromines’ Forward Vision

- Achieve **100% responsible and balanced sourcing** of mineral resources for the EU
- Keep **whole value chains** present in the EU
- Let the EU be the “**international partner of choice**” for sustainable transformation of primary and secondary mineral resources
- In other words, **Lead by example** in the EU
Invitation to:

Greek Presidency Conference

Maximizing value: The importance of the extractive industry to growth in the EU economy and its regions

June 20th, 2014
Athens, Greece
We must shape the future of our industry in Europe

Thank you for your kind attention

In case of any questions please contact:

Euromines
12, Avenue de Broqueville
B-1150 Brussels
Belgium
Tel.: +32 2 775 63 31
Fax: +32 2 770 63 03
E-mail: assistant@euromines.be

www.euromines.org