



Annual Report 2001

***“MINERALS  
MAKE MORE  
OF LIFE!”***

## Euromines Steering Committee

**June 2000 - June 2002**

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## FOREWORD by the President of Euromines Shaun Stewart – Rio Tinto

There never seems to be a quiet day or a dull year for the European mining industry – 2001 proved to be one of the busiest yet for Euromines and its members. The number of initiatives, meetings and activities with which Euromines was engaged reached a record level and the next few years will, no doubt, be just as busy.

As you will see from this 2001 Annual Report, in addition to ongoing health and safety issues the European mining industry was faced with a number of important developments flowing from the European Commission's Communication on the non-energy extractive industry and sustainable development. Euromines has been actively involved in Working Groups to re-evaluate the Raw Materials Supply Group, to engage in EU enlargement and mining issues, to develop sustainable development indicators and, last but not least, in the roll out of the Safe Operation of Mines Communication, all of which continue at a different pace.

Whilst many of these activities are reaction to some of the high profile mining related incidents of the past, the industry has been engaged in a number of forward looking global and European initiatives aimed at addressing mining and sustainable development issues and at promoting the importance and necessity of mining and its products to a sceptical public.

Euromines has actively participated in the European regional Mining, Minerals and Sustainable Development (MMSD) project which is part of Global Mining Initiative (GMI) and members voted that Euromines join the International Council on Mining and Minerals (ICMM) at the end of the year. These, together with our involvement in R&D and mining education, are all proactive moves for the industry and we must hope that they will begin to influence public opinion in a positive way here in Europe and elsewhere. Society lacks awareness about mines, minerals and metals, even though it uses mined products every minute of people's lives. Our world is totally reliant on minerals and metals yet government and society often treat mining and its products with suspicion; the connection isn't made between the mined product and the article or material used in everyday life.

Some argue that the environmental and social cost of extracting and using metals and minerals is at an unacceptable level. In fact, provided it is properly planned and managed, ore extraction can result in transformations that create lasting social, economic and environmental capital, not only meeting current needs, but providing both hard and software to enable future generations to live to higher standards than could otherwise have been attained. These messages were promoted during the 2001 European Mining Week and we hope that "Minerals 2002" will be able to engage broad sections of society in the same way.

Thanks must go to the Chairpersons and active participants of the Euromines Committees and Working Groups for their energy and support—these are vital to ensure our continued influence and standing in Brussels over a wide range of mining related issues. Without active member participation in our work and the provision of reliable statistical data, we cannot hope to promote and present the mining industry in a positive and improving light.

I am sure you all join me in expressing our special thanks and appreciation to Dr Corina Hebestreit, Ingrid Poncet and Marleen Bellen for all their hard work, efficiency and resilience over a very busy 2001.

*Shaun Stewart*

# The mining industry in Europe

## Euromines' new mission statement

As a response to the growing number of legislative and communication issues affecting the European mining industry, Euromines held a Strategy Meeting in June 2001. The members reviewed the Euromines' Value and Mission Statement and came to conclusions regarding priorities, structure and function.

One of the decisions taken is that Euromines will establish a separate Committee on the issue of Sustainable Development and the European Mining Industry.

### VALUE AND MISSION STATEMENT

EUROMINES is a Belgian registered federation of European mining companies and national European mining associations. It aims to conduct its affairs in a properly accountable manner, reflecting the interests of its members.

In order to authoritatively represent and promote the interests and views of the European mining industry, EUROMINES shall actively and constructively engage all levels of the European Community institutions and civil society in good faith and in a manner that is responsible and representative of the views of its members. The activities and products of EUROMINES' members help meet demand for minerals in Europe and elsewhere, which sustain and contribute to essential improvements to the wellbeing of society, as well as making direct contributions to the economies and employment of those countries in which they operate.

In order to maintain and achieve these values and objectives, EUROMINES shall:

- engage, influence and encourage opinion leaders in the European Community institutions, member states and civil society (particularly NGOs, parliamentarians and young people) in all aspects of mining, including its relevance to sustainable development, to foster a better and more positive understanding and appreciation of mining, its products and related issues and to improve mining's reputation in Europe;
- become a channel of reliable data (such data to be provided by members) relevant to the mining industry for use within and outside of the sector in order to enable the promotion of the socio-economic, competitive and other benefits that mining brings to Europe and to support the views of the mining industry, national and international mining associations on any legislative or regulatory initiatives affecting mining in Europe;
- provide early notification to members of legislative and regulatory initiatives affecting mining and its products in Europe and, respecting members' differing cultures and views, facilitate the identification and adoption of a common position or consensus viewpoint on the issues among the membership;

- represent and promote, as effectively and authoritatively as possible, the position and views of EUROMINES to the European Community institutions on legislative and regulatory issues and, where necessary, assist in promoting such position with Member State authorities;
- coordinate and collaborate with national, European and other associations representing mining activities or mineral products on common issues so as to encourage an effective network of such associations designed to promote the interests of the mining sector in Europe; and shall promote, lead or co-lead such association coordination or collaboration on such issues where appropriate;
- encourage the development of performance indicators and voluntary initiatives in the European mining industry as alternatives to regulation and shall encourage, as appropriate to the circumstances, activity between national governments, organised labour and industry to support and promote the interests of mining in Europe;
- promote the positive role of mining and its products in the transition to sustainable development and encourage any mining related legislation and regulation proposal to be viewed and assessed in the light of sustainable development.

## The European Policy on Sustainable Development:

### ***Follow-up of the Commission's Communication on the non-energy extractive industry and its sustainable development:***

In many aspects 2001 was dominated by the legislative follow-up of the European Commission's Communications on the non-energy extractive industry.

DG Enterprise established several Working Groups (WG) to develop many of the actions suggested in the Communication.

The **WG Institutions** was established to evaluate the effectiveness and working procedures of the Raw Materials Supply Group. A discussion document was issued in June to reform the group with the aim to improve its efficiency. Euromines, like other industry federations, was actively involved in the process.

The joint industry proposal to establish a Council for the Extractive Industry, which would have lifted the debate to a different political level by involving all DGs, in an equal way, was not favoured by DG Enterprise and received limited support from other DGs involved. The Commission's current operating structure does not adequately reflect a stakeholder dialogue in the broad arena of sustainable development. The industry will follow up this idea at the next opportunity.

The **WG Enlargement** met to investigate the economic, environmental and social aspects of relevance for the mining industry in the EU enlargement process. As a first step the comprehensive statistical work carried out by the German BGR, was translated into English and will be available at the beginning of 2002. At the same time the group decided that both EuroGeoSurveys and Euromines, based upon their experience, would develop a background paper to state the case for support for the mining sector in Central and Eastern European countries, particularly with regard to environmental and social performance.

The **WG for Sustainable Development Indicators** for the non-energy extractive industry has evaluated general performance indicators and has made a selection of indicators for each pillar of sustainable development. These will be presented to the industry and tested on selected enterprises in order to evaluate their applicability and feasibility for reporting against more widely across the industry. This process will start in 2002.

The Commission is continuing to develop its sustainable development strategy throughout 2001. It is developing sustainable development indicators by which it proposes to measure the progress of the mining industry towards sustainable development in the future. It will be a challenge for the industry to position itself against both European and international demands and indicators on its performance.



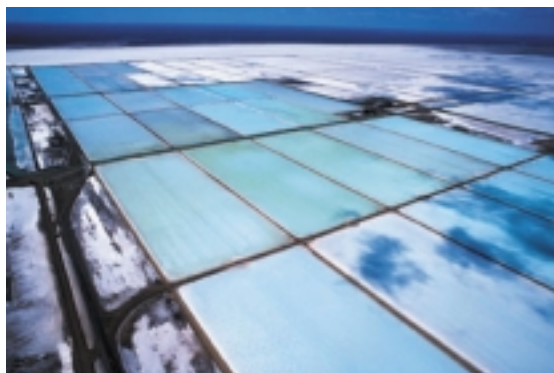
The *WG on the Communication on the Safe Operation of Mines*, is chaired by Euromines. Its remit is to monitor and track the process of the development of environmental legislation envisaged by DG Environment being:

- (a) the amendment of Seveso II;
- (b) the European mine waste legislation and;
- (c) the Best Available Technique Notes.

In this context the WG has invited representatives from DG Environment to report on progress in these areas and to discuss specific topics, such as risk management. The WG held several sessions on specific aspects of waste management in the extractive industry including site visits (e.g. visit of SCR-Sibelco on January 22<sup>nd</sup>, 2002). It is planned to hold a workshop on mine waste management in Ireland in February 2002.

## EU Energy policy

### *Post Kyoto Strategy: The EU's status and targets for meeting agreed climate change targets for Europe*



The European Commission's Communication on EU Post Kyoto Strategy covers the following main issues:

- the development of indicative reduction targets for all economic sectors;
- the development of actions to reduce emissions in key sectors : energy, transport, agriculture and industry. For the latter, the main instrument should be long-term agreements on energy efficiency improvement;
- the use of flexible instruments such as emission trading to comply with emission reductions, with a ceiling on the use of these instruments and their operation which should be carefully controlled.

In June 1998, the European Council adopted conclusions on the European Community Strategy on climate change and determined that the 8% reduction target from 1990 should be shared between the EU Member States. A list of common and co-ordinated policies and measures designed to achieve the EU and national targets was presented. This includes the taxation of energy products and further voluntary-based energy efficiency programmes from industry.

The reduction targets identified over the past few years have been reasonably positive for industry to the extent that industrial emissions were already below 1990 levels. This is mainly attributable to the shutdown of highly polluting factories following the reunification of Germany, which reduced emission levels by 3-4%; to the UK's replacement of subsidised coal fired power generation by gas, and; to the improved performance of nuclear power generation. As a result, the European Commission believes that the Kyoto targets will be met without an excessive cost burden on industry. In 1997 the European Commission report, indicating Kyoto compliance costs in the region of 25 billion Euro/year, has been revised downwards to 5 billion Euro/year. It should however be noted that the Kyoto targets will be met by some of the Member States without

excessive costs; for some branches within the sector (energy intensive sector) a further reduction of the specific emissions will be extremely difficult.

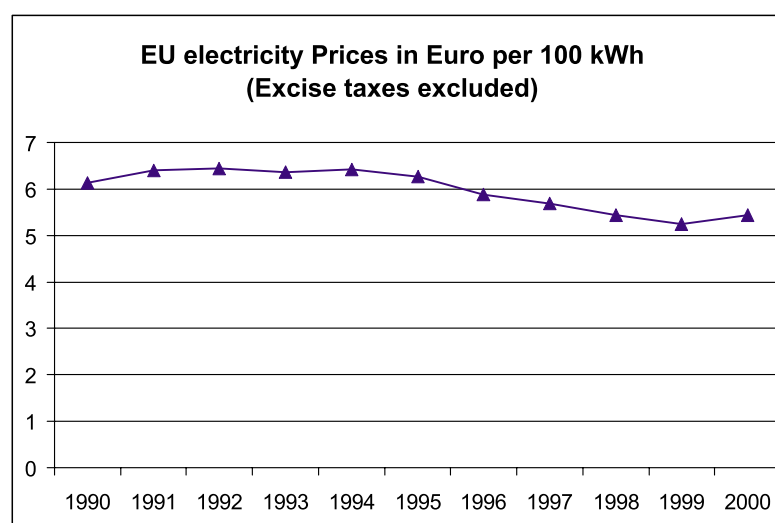
The industry is concerned with the development of the three main aspects of the EU's Energy Policy

- **Price:** the Commission's aim to ensure a competitive supply of energy to all customers (the public, private and corporate sectors as well as individuals);
- **Security of supply:** the Commission must ensure that energy supplies are secure;
- **Respect for the environment:** the Commission must ensure that the first two objectives are achieved whilst at the same time respecting environmental constraints. In the view of the Commission environmental constraints represent the ultimate limitations. If these did not exist, there would be an abundance of low-price coal and an electricity supply system very much based on nuclear power at competitive prices.

If these aims are not fulfilled in an appropriate fashion there is still the risk of de-localisation of industry outside the EU for competitiveness reasons.

### ***Liberalisation of the energy markets:***

It is understood that the European Commission shares industry's concern that energy liberalisation is not occurring fast enough as well as sharing the desire to avoid technical barriers between Member States. There are Member States and industries in member states that have complained to the European Commission about the impact of the proposed energy liberalisation and the emerging structures and prices as regards their ability to remain competitive.



***Commission's Green paper on Security of Energy Supply***

The last European Commission Green Paper on energy- "Towards a European strategy for the security of energy supply" (COM (2000)769, November 2000) - is recommended reading for any energy using industry. It makes good business sense to focus on energy savings and energy efficiency for the mining industry, however, the concept of energy taxation will cause substantial difficulties for any sector that is dependent on competitively priced energy.

## EU Chemical Policy

### *EU's New Chemicals Policy*

In February 2001 the European Commission issued its White Paper on Chemicals Policy which introduced a new approach to the management of chemicals in the European Union.

The new strategy is articulated around the following key elements:

- **Reversal of responsibility from authorities to industry for the testing and risk assessment of chemicals;**
- **Introduction of an authorisation system in cases where stringent control is assured for the most dangerous substances;**
- Increased transparency and information about chemicals;
- Merging the regulatory framework for existing and new substances;
- Promotion of innovation and competitiveness without compromising a high level of protection.

Under the proposed new scheme, an industry producing a covered substance will be responsible for supplying data relative to that chemical, following which the authorities will be called upon to evaluate the data provided by industry and to decide on additional substance-tailored testing programmes following industry proposals. Increased responsibility will also be placed on the users in the manufacturing chain (formulators and downstream users), who will have to supply data relative to the particular use they make of such a substance.



The new system for assessing both existing and new chemicals is known as the REACH system. This will contain the following three elements:

- *Registration* of basic information for around 30,000 substances (all existing and new substances exceeding a production volume of 1 tonne) to be submitted by companies in a central database. **This will apply to all metals and most minerals and their compounds.** Subject to certain conditions, the following are the suggested deadlines for the submission of registration dossiers for substances exceeding a production volume of:
  - 1,000 tonnes - by the end of 2005 at the latest,
  - 100 tonnes - by the end of 2008 at the latest,
  - 1 tonne - by the end of 2012 at the latest.
- *Evaluation* of the registered information for all substances exceeding a production volume of 100 tonnes or, in case of concern, also for substances at lower tonnages; this evaluation will be carried out by the authorities and will include the development of substance-tailored testing programmes focussing on the effects of long-term exposure. **This will also apply to most metals and minerals and their compounds.**
- *Authorisation* of substances which are carcinogenic, mutagenic or toxic to reproduction (CMRs) and persistent organic pollutants (POPs). **This means that the marketing and use of such substances are authorised ONLY IF the safety of their applications is demonstrated by industry.**

This strategy is expected to impact raw material producers because they will have to provide risk assessment for their products and it will increase pressure to remove naturally occurring substances that are deemed undesirable in products. Raw material producers will have to follow the development of the detailed procedures of this evolving EU policy extremely closely.

## Environment

### ***Follow-up of the Communication on the Safe Operation of Mines***

As recommended in its October 2001 Communication, the European Commission set out to develop three legislative measures: first the amendment of the Seveso II Directive; secondly the development of a European wide waste legislation and thirdly the development of a BAT note on mine waste management. These legislative initiatives are of great importance to the mining industry and Euromines has and continues to monitor them very closely.

### ***Seveso II***

*"The aim of the Seveso II Directive is two-fold. Firstly, the Directive aims at the prevention of major-accident hazards involving dangerous substances. Secondly, as accidents do continue to occur, the Directive aims at the limitation of the consequences of such accidents not only for man (safety and health aspects) but also for the environment (environmental aspect). Both aims should be followed with a view to ensuring high levels of protection throughout the Community in a consistent and effective manner".*

In June 2001 DG Environment tabled the amendments for the Seveso II Directive and held a transparent consultation process. Although the European mining industry does not, in principal, oppose the suggested amendments, there is still much doubt whether European legislation can lead to practical prevention of accidents. Such legislation may possibly minimise the risk of accidents, but, legislation alone cannot totally prevent them. The industry believes that practical training and the building of competence capacity in the industry are more appropriately required.

An accident in the chemical industry delayed the issuing of the legislative proposal and it is now expected that the Council of Ministers will approve the new legislation during the course of 2002.

### ***European Mine Waste Legislation: a first Working Paper***

As a second measure the European Commission has started to work on a proposal for a separate piece of mine waste legislation. In June 2001 DG Environment began a public consultation process over a working document covering the management of waste resulting from the prospecting, extraction, treatment, and storage of mineral resources. After consultation with Member States representatives, environmental NGOs and industry representatives, which demonstrated that DG Environment's approach adapted for the Landfill Directive was inappropriate, a new working document is due to be issued in the first quarter of 2002.

<sup>1</sup> <http://europa.eu.int/comm/environment/seveso/>

### ***BAT note on mine waste management***

Linked to mine waste legislation, a Best Available Technique document will be developed by the European IPPC/BAT Bureau in Seville. The kick-off meeting for the BAT project, which will take approximately two years, took place in Seville in June 2001. A concluding meeting will take place at the end of the two years process. Metals, industrial minerals, coal and oil shale are covered in so far as they are produced in Europe (EU and candidate countries) in significantly large quantities and involve tailings disposal.



Four industry associations are involved in the BAT process are Euromines, the Industrial Mineral Association (IMA), the European Solid Fuels' Association (CECSO), and Barytes Association.

By the end of 2001, Euromines decided to supplement its Secretariat by appointing Mr Nils Eriksson (formerly EHS Manager at Boliden Aznacollar Mine) located in Seville, as a consultant to assist and organise input from certain Euromines members into the Institute for Prospective Technological Studies (IPTS) Secretariat responsible for preparing the BAT Notes.

### ***DG Environment study on mine waste management***

The long expected study on the "Management of Mining, Quarrying and Ore-Processing Waste in The European Union", commissioned by DG Environment and carried out by a consortium of companies and geological surveys, was finalised and presented to the industry and the Member States. Euromines has commented on this study, which is flawed by statistical errors and which has suffered considerably due to a lack of proper funding and an impractical time scale for completion. The second part of the study on Eastern Europe is pending and will be issued during 2002.

### ***Study on costs of mine waste management***

In order to evaluate the potential impact of new mine waste legislation in the European Union DG Environment has commissioned a study on the cost implications of such legislation. The study was awarded to a consortium of the Symonds Group (UK) in association with COWI (Denmark).

One comment made by Euromines during the consultation process was that the evaluation of the impact of such legislation seemed to be premature if the extend of the legislation was not yet known. The collection of mine waste management costs is difficult as such costs are an integral part of operating costs and a comparison with potential future cost is therefore difficult. The industry did not agree with the report, which was finalised in October 2001.



### ***EU Directive on Environmental Liability***

In February 2001, the European Commission presented a White Paper on environmental liability, which set out the possible features of a future Community regime for environmental liability. The White Paper suggested that the most appropriate option would be a Community Directive.

The Commission received numerous responses from interested parties, and as a follow-up to the White Paper and in the context of preparation of a proposal for legislation, the Commission asked for interested party comments on a further *Working Paper on the Prevention and Restoration of Significant Environmental Damage*, which setting out the form of future legislation.

Although the industry accepted the political aims of the authorities to implement a liability scheme, there were numerous key issues of concern for the European mining industry.

There was uncertainty with regard to definitions as in the case of the term "Significant Environmental Damage" (SED), the lack of insurability, the need to clarify the legal concepts of strict and joint liability, and the difficulties in assuring that no retroactive liability would apply.

Together with many other sectors Euromines was involved in the consultation process and made its concerns heard.

In 2002 the Commission will table its proposal for a Directive.

### ***Ambient Air Quality – CAFE***

Whilst within the framework of the EU Ambient Air Quality - with the aim to develop an overall strategy through the setting of long-term air quality objectives - the first two daughter directives (99/30/EC with limit values for NO<sub>x</sub>, SO<sub>2</sub>, Pb and particles; 2000/69/EC with limit values for CO and benzene) have passed; the fourth daughter Directive on Cadmium, Lead, Zinc, Mercury and PAH (poly-aromatic hydrocarbon) is still under discussion. Due to interventions from Member States the original proposals were withdrawn and redrafted by the Commission. In this context, the EU has now launched Clean Air for Europe (CAFE), programme which aims to develop a long-term, strategic and integrated policy to protect against the effects of air pollution on human health and the environment

CAFE has the following specific objectives<sup>2</sup>:

1. *"to develop, collect and validate scientific information relating to the effects of outdoor air pollution, emission inventories, air quality assessment, emission and air quality projections, cost-effectiveness studies and integrated assessment modelling, leading to the development and updating of air quality and deposition objectives and indicators and identification of the measures required to reduce emissions;*

<sup>2</sup> <http://www.europa.eu.int/comm/environment/air/cafe.htm>

2. *to support the implementation and review the effectiveness of existing legislation, in particular the air quality daughter directives, the decision on exchange of information, and national emission ceilings as set out in recent legislation, to contribute to the review of international protocols, and to develop new proposals as and when necessary;*
3. *to ensure that the sectoral measures that will be needed to achieve air quality and deposition objectives cost-effectively are taken at the relevant level through the development of effective structural links with sectoral policies;*
4. *to determine an overall, integrated strategy at regular intervals which defines appropriate air quality objectives for the future and cost-effective measures for meeting those objectives;*
5. *to disseminate widely the technical and policy information arising from implementation of the programme”.*

The industry will have to monitor the development of the proposed measures and their potential impact on the sector closely during 2002.

## Social Issues

### ***Physical Agents Directive: Vibrations***

In September and October 2001 the European Parliament considered a piece of legislation that had earlier been suspended and made amendments to the Common Position adopted by the Council on the proposed “*Council Directive on the minimum health and safety requirements regarding the exposure of workers to the risks arising from physical agents (vibration)*”.

The proposed amendments on Whole Body Vibration (WBV) and the transitional periods for implementation were and still are unacceptable for the mining industry, as they were for many other industries, such as forestry and agriculture. Despite many discussions the Parliament Plenary Session, in October 2001, accepted the amendments so that the proposal will now go back to the Commission and into the Conciliation procedure, which will start during 2002.

### ***Occupational exposure limit value for NO***

Despite the fact that the issue of NO<sub>2</sub> and CO Occupational Exposure Levels (OEL) have still not been finalised, the European Commission’s scientific expert body, SCOEL, issued a recommendation for an OEL value for NO of 0,2 ppm. The scientific justification for such a recommendation was less convincing than that made previously for the NO<sub>2</sub>/OEL and without any linkage to the NO<sub>2</sub> proposal the NO OEL proposal seemed to be very arbitrary. The mining industry has strongly opposed these procedures and the values suggested.

### ***Euromines Diesel Workshop***

Euromines held a workshop on Machinery Diesel Emissions at the Tara Mine Eire mine site in October 2001. The workshop informed members about the medical evidence of diesel particulate and emission impact on workers as well as the latest information on emission measuring technology and preventive measures. Further monitoring and discussion on this issue will be required.

### ***The future of the SHCMOEI***

The Safety and Health Commission of the Mining and Other Extractive Industries (SHCMOEI), which was established by Member States in 1952 under the European Coal and Steel Treaty to improve coal mine safety, underwent a revision of its remit and structure in 2001.

Additional to its usual activities, the SHCMOEI spend some time considering its future structure and activities. As a result it extended its membership in Spring 2001 to the EU accession countries and at the end of 2001 presented a proposal for its own reform which would cut its costs and improve efficiency.

The proposals have to be discussed with the European Commission in 2002 and will, it is to be hoped, result in a more effective and more influential body which can help the EU accession countries in the demanding task of implementing the Aquis Communautaire and promoting health and safety performance in the extractive industry.

With regard to EU legislation the SHCMOEI intervened with Resolutions on the issues of whole body vibrations and on the amendments of the Seveso II Directive.

Under the Spanish Presidency in 2002 the SHCMOEI intends to hold a conference in March 2002 in Oviedo to discuss health and safety issues as well as social aspects and sustainable development in the non-energy extractive industry.

### ***Social dialogue – a new tool for stakeholder dialogue***

EMCEF, the European trade union representing mine workers, supported by the coal and potassium mining organisations, CECSO and APEP, have submitted an official, collective request to the European Commission for the establishment of a Social Dialogue Committee for the European mining industry.

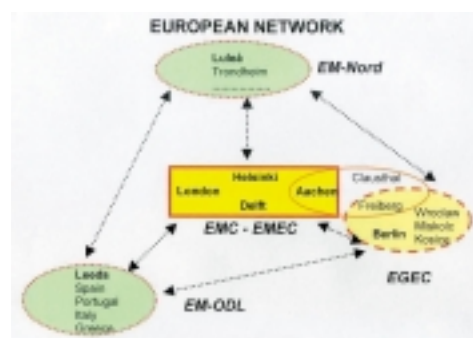
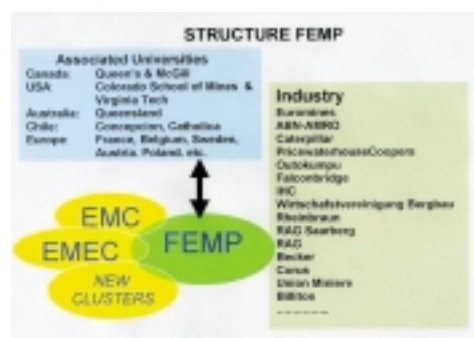
During the first half of 2001 Euromines asked the independent consultancy firm ASTON Communications to identify the appropriate representative Member State mining industry employers federations and to organise a preparatory which took place on March 14<sup>th</sup> 2001. The aim was to define a strategy for possible participation in the future EU Sectoral Social Dialogue for the Mining Sector.

DG Employment and Social Affairs together with the Unions (EMCEF) invited Euromines to participate in this Social Dialogue. A decision on participation will be taken in 2002.

## Mining and education: FEMP – Foundation of European Mineral Programmes

The annual meeting of the Industrial Advisory Board (IAB) of the Foundation of European Mineral Programs (FEMP) took place in Aachen in December 2001 and was combined with the annual gathering of the student body and Alumni of the European Mining and the European Mineral Engineering Courses. The meeting was followed by a workshop on: *“Expectations, views from graduates and Industry”*.

Additional clusters of FEMP related programmes are being launched between Berlin and several Eastern European universities and between UK and Spain.



## Research and Development



### EMiReC

The European Mineral Resources RTD Council (EMiReC) has continued to represent the interests of the mining sector regarding the development of the European Commission’s 6<sup>th</sup> Framework Programme on R&D. The Council has been able to appoint Dr Gordon Adam – MEP (PEs/Lab), as an external adviser. Dr Adam was able to table a number of amendments to the Commission’s programme proposals in order to strengthen the raw materials sector involvement and to support its importance in the programme. It is hoped that the European Parliament and the Council will accept these amendments.

In March 2001 EMiReC organised its first European RTD Day for the extractive industry and with a participation over one hundred European and international representatives from industry, academia, and governments discussed the relevant RTD issues for the sector.

### ***Eurothen Closing Conference held in June 2001 in Stockholm***



Eurothen, the thematic research network for the extractive industry, which was funded by the Commission under the 4<sup>th</sup> and 5<sup>th</sup> R&D Frameworks held its final closing conference in Stockholm in June 2001. About 170 participants from academia, industry and the European Commission participated and expressed their satisfaction over the 4-year-old research network. The outlook for further activities was discussed. Prof. Wilke who was the research cluster co-ordinator for Euromines retired from this role in June 2001. He has contributed considerably to the work of the network and has successfully established the link between industry and academia in this area.

### ***NESMI - Network for the Sustainable Development of the Mining Industry***



In October 2001, the European Commission approved the mining sector's proposal to establish a new research network for the extractive industry NESMI (Network for the Sustainable Development of the Mining Industry), which will continue the successful work that has been developed over the past four years under the Eurothen network.

The network includes more than 50 active members of the sector, industry, academics, geological surveys etc. and aims to become the major platform for extractive industry research over the next three years.

As a consequence Euromines and its members have already been asked to participate in NESMI research projects.

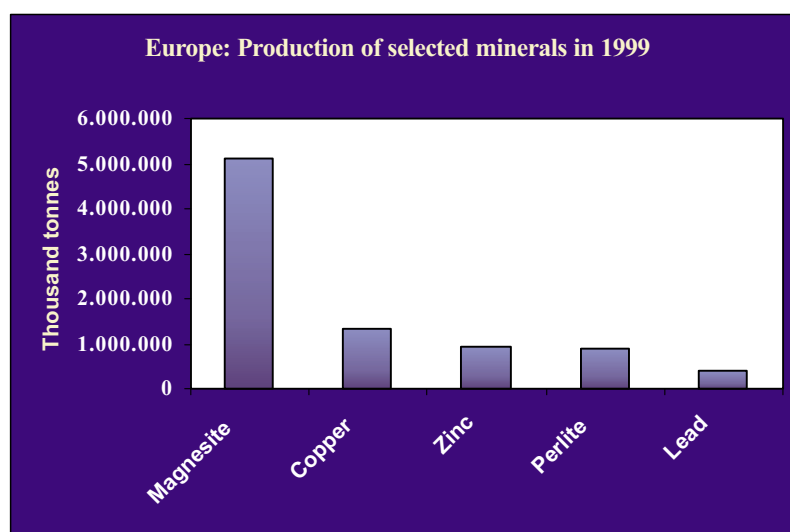
## Image and Communication



### The First European Mining Week: *The Future Begins with Mining*

In 2001 the extractive industry held its first European Mining Week, involving activities in and around mines and mining in Europe. For the first time mining operations in various Member States engaged a joint activity programme. Mining operations in Austria, Germany, Finland, and Sweden were the principal participants.

The aim of the European Mining Week was to draw attention to the importance and the necessity of raw material production and use in modern society. In order to be able to produce these products and to ensure just a basic standard of living, mining in Europe requires appropriate legal and economic frameworks. The economic importance of mining for local communities in the form of employment and associated revenues is considerable. Mining and quarrying operations are fixed in their geographic locations unable to be relocated unlike many other forms of industrial activity. Following exhaustion of ore and mineral bodies the land is rehabilitated and returned to society for further use.



Europe still remains a substantial producer of metals and minerals as well as a supplier of mine related machinery and expertise in the areas of exploration, exploitation, processing and environmental technology around the world.

Several national mining associations across Europe carried out special activity programmes to inform the public about mining and minerals in Europe in 2001.

In 2002, activities are foreseen within the context of "Minerals 2002" which is proposed to be a European version of the UK Minerals' 98 project which was successful at promoting the importance of minerals in daily life.







## European mining companies and international perspective

### The Global Mining Initiative (GMI)

*"The Initiative brings together many of the world's largest mining and minerals companies. This leadership exercise aims to ensure that an industry which is essential to the well-being of a changing world is responsive to global needs and challenges.*

*The Initiative will include a number of activities leading up to a global conference on mining and sustainable development in May 2002. This conference will be a significant contribution to the events that will mark the 10th anniversary of the Rio Earth Summit. The objective is to reach a clearer definition and understanding of the positive part the mining and minerals industry can play in making the transition to sustainable patterns of economic development"* (<http://www.globalmining.com>)

The GMI newsletter gives updates on the latest developments of the GMI programme and can be downloaded from the website.

### Mining Minerals and Sustainable Development (MMSD) – a global stakeholder consultation

The world-wide stakeholder consultation process carried out as part of the GMI was started in Europe in December 2000 with a facilitated meeting of stakeholders. Due to the complex situation in Europe with varying stakeholder groups in the 15 EU member states, the International Institute for the Environment and Development (IIED) appointed a researcher to write the European section of the report focusing on a number of European key issues, such as waste and recycling. The European part of the report will be available first quarter of 2002 and a first discussion on it will take place in March 2002 in London.

The overall MMSD report will be issued in draft and finalised by May 1<sup>st</sup> 2002 before the GMI Toronto conference later in May 2002 – See <http://www.gmiconference.com>

The MMSD Project Bulletins can be downloaded from its website: <http://www.iied.org/mmsd>

## Euromines and the International Council on Mining and Metals (ICMM)

In 2001 the global mining industry took the decision to transform the International Council on Metals and on the Environment (ICME) into a new industry organisation aimed at meeting the new challenges that the industry is faced with.

*“ICME is changing itself to a broader international organisation to provide Sustainable Development leadership for our industry in co-operation with existing national, regional and commodity associations and their programmes”.*

The newly constituted association is named the International Council on Mining and Metals (ICMM). Dr Jay Hair was appointed as its first Secretary General.

Dr Hair has previously led two of the world’s most prominent environmental organisations. Dr. Hair declared his commitment to dedicate his work for the mining, minerals and metals industry to “economic progress, environmental protection and social responsibility”.

From 1981 to 1995 Dr. Hair served as President and Chief Executive Officer of the National Wildlife Federation (NWF). During his presidency the NWF was the US’s largest membership-based environmental organisation. Highlights during his NWF presidency included creation of the NWF Corporate Conservation Council to promote communication about environmental issues with the business community and the establishment of the NWF International Affairs Division to address global environmental concerns.

In January 1994 he was elected to a three-year term as President of the Switzerland based IUCN - The World Conservation Union. More recently he was affiliated with the Perkins Coie law firm where he undertook international environmental and social compliance audits and served as independent adviser to James Wolfensohn, President of the World Bank Group<sup>3</sup>.

The ICMM offices are located at

19 Stratford Place- London- W1C 1BQ

Tel.: +44 (0) 20 7290 4920

Fax: +44 (0) 20 7290 4921

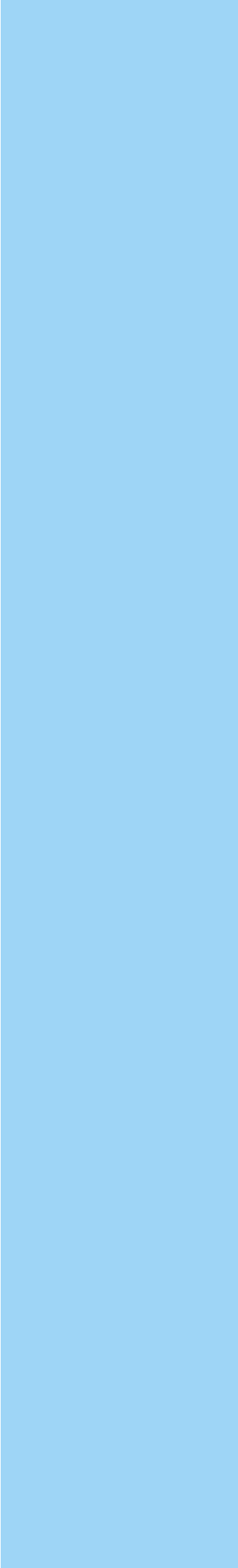
Website: <http://www.icmm.com>

<sup>3</sup> ICME News Release, August 14<sup>th</sup>, 2001

The inaugural ICMM meetings took place in October 2001 in London.

Apart from continuing previous relevant ICME work, ICMM will focus on developing a policy of sustainable development for the international mining industry and in the medium term prepare the industry's response to the outcome of the MMSD stakeholder consultation to be concluded at the beginning of 2002 to prepare the sector's input into the World Summit in Johannesburg in August/September 2002.

Euromines members voted unanimously to join ICMM as a European federation member at the General Assembly in December 2001.



## Euromines Membership (as at 31.12.2001)

### Mining Federations

<b>Austria</b>	FACHVERBAND DER BERGWERKE UND EISENERZEUGENDEN INDUSTRIE Goethegasse 3 Postfach 300 A-1015 Wien AUSTRIA	Tel.: + 43 1 512 46 01 25 Fax: + 43 1 512 46 01 20	<a href="mailto:fvi1@wkoesk.wk.or.at">fvi1@wkoesk.wk.or.at</a>
<b>Finland</b>	FAERI (Association of Finnish Extractive Resources Industry) Eteläranta 10 FIN-00131 Helsinki FINLAND	Tel.: + 358 9 1923 380 Fax: + 358 9 624 462	<a href="mailto:kty@met.fi">kty@met.fi</a>
<b>France</b>	CHAMBRE SYNDICALE DES INDUSTRIES MINIERES Avenue de Messine, 30 F-75008 Paris FRANCE	Tel.: +33 1 45 63 02 66 Fax: +33 1 45 63 61 54	<a href="mailto:fmmnfx@aol.com">fmmnfx@aol.com</a>
<b>Germany</b>	WIRTSCHAFTSVEREINIGUNG BERGBAU 4, Am Schillertheater D-10625 Berlin GERMANY	Tel.: + 49 30 31 51 82 42 Fax: + 49 30 31 51 82 52	<a href="mailto:wvb.schaechter@t-online.de">wvb.schaechter@t-online.de</a>
<b>Greece</b>	GREEK MINING ENTERPRISES ASSOCIATION Zalokosta Street 4 GR – 10671 Athens GREECE	Tel.: + 30 1 36 38 318 Fax: + 30 1 36 34 019	<a href="mailto:Sme@hol.gr">Sme@hol.gr</a>
<b>Ireland</b>	IRISH MINING AND EXPLORATION GROUP Confederation House 84/86 Lower Baggot Street IRL-Dublin 2 IRELAND	Tel.: +353 1 605 1500 Fax: +353 1 660 1717	<a href="mailto:Sean.Beary@ibec.ie">Sean.Beary@ibec.ie</a>
<b>Portugal</b>	APIMINERAL Av. Manuel da Maia 44-4° Dt° P-1000 Lisboa PORTUGAL	Tel.: + 351 1 84 99 225 Fax: + 351 1 84 97 233	<a href="mailto:Apimineral@ip.pt">Apimineral@ip.pt</a>
<b>Sweden</b>	SVENSKA-GRUVFORENINGEN The Swedish Mining Association 19, Storgatan P.O.Box 5501 S-11485 STOCKHOLM SWEDEN	Tel.: + 46 8 783 81 51 Fax: + 46 8 663 63 23	<a href="mailto:tfm@mining.se">tfm@mining.se</a>
<b>United Kingdom</b>	THE MINING ASSOCIATION OF UNITED KINGDOM Expert House Sandford Street, Lichfield UK-WS13 6QA Staffordshire UNITED-KINGDOM	Tel.: + 44 1543 26 29 57 Fax: + 44 1543 26 21 83	<a href="mailto:bob.fenton@mauk.org.uk">bob.fenton@mauk.org.uk</a>
<b>Turkey</b>	THE TURKISH MINERS ASSOCIATION Tunca Ap.NO: 47/1-1 Tünel İstanbul TURKEY	Tel.: +90 212 245 1503 Fax: +90 212 293 8355	<a href="mailto:turkiyemaden@ixir.com">turkiyemaden@ixir.com</a>

## COMPANIES

<b>Finland</b>	OUTOKUMPU MINING OY P.O.Box 143 FIN-02201 ESPOO FINLAND	Tel.: + 358 9 421 2647 Fax: + 358 9 421 2403	<a href="http://www.outokumpu.com">http://www.outokumpu.com</a>
<b>France</b>	COGEMA Rue Paul-Dautier 2 B.P. 4 F-78141 Velizy Cedex France  ERAMET Tour Maine Montparnasse Rue due Maine, 33 F-75015 Paris France	Tel.: 00 33 1 39 26 31 45 Fax: 00 33 1 39 26 27 06  Tel.: 00 33 1 45 38 41 49 Fax: 00 33 1 45 38 46 09	<a href="http://www.cogema.fr">http://www.cogema.fr</a>  <a href="http://www.eramet.fr">http://www.eramet.fr</a>
<b>Greece</b>	TVX Gold Mining Services 2, Koymbari St GR-106 74 Athens	Tel.: 0030 36 13 260 Fax.: 0030 36 06 258	<a href="http://www.tvxgold.com">http://www.tvxgold.com</a>
<b>Ireland</b>	TARA MINES Ltd. Knockumber House Knockumber Road, Navan IRL-CO. MEATH IRELAND	Tel. + 353 46 21927 Fax. + 353 46 22687	<a href="http://www.outokumpu.com">http://www.outokumpu.com</a>
<b>The Netherlands</b>	NEDMAG INDUSTRIES Mining and Manufacturing B.V. Billitonweg 1 P.O.Box 241 NL-9640 AE VEENDAM THE NETHERLANDS	Tel.: + 31 59 865 19 11 Fax: + 31 59 865 12 05	
<b>Spain</b>	MAGNESITAS NAVARRAS S.A. Carretera Nacional 135 , km 20 E-31630 ZUBIRI - NAVARRA SPAIN  MAGNESITAS DE RUBIAN S.A. Apartado de Correos 50 E-27600 SARRIA (Lugo) SPAIN	Tel.: + 34 48 30 40 00 Fax: + 34 48 30 41 30  Tel.: + 34 82 42 42 11 Fax. + 34 82 42 42 50	<a href="http://www.mgr.es">http://www.mgr.es</a>
<b>Sweden</b>	BOLIDEN AB S-93681 BOLIDEN SWEDEN  LKAB S-98381 Malmberget SWEDEN	Tel.: + 46 910 774 162 Fax: + 46 910 774 296  Tel.: + 46 970 710 00 Fax: + 46 970 715 93	<a href="http://www.boliden.se">http://www.boliden.se</a>  <a href="http://www.lkab.com">http://www.lkab.com</a>

<b>United Kingdom</b>	ANGLO AMERICAN Plc		
	20 Carlton House Terrace	Tel.: + 44 171 698 8550	<a href="http://www.angloamerican.co.uk">http://www.angloamerican.co.uk</a>
	U.K-SW1Y 5AN St James London UNITED KINGDOM	Fax: + 44 171 698 8560	
	BILLITON INTERNATIONAL SERVICES Ltd		
	1-3 Strand	Tel.: + 44 171 747 3804	<a href="http://www.billiton.com">http://www.billiton.com</a>
	London WC2N 5HA UNITED KINGDOM	Fax: + 44 171 747 3914	
	RIO TINTO		
	6 St. James's Square	Tel.: + 44 171 930 23 99	<a href="http://www.riotinto.com">http://www.riotinto.com</a>
	UK-LONDON SW1Y 4LD UNITED-KINGDOM	Fax: + 44 171 753 22 40	

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