

2006

annual report

Providing
the foundations



euromines



The image features a light blue background with scattered white clouds. In the center, there are two semi-transparent, light blue silhouettes of a man and a woman. The man is on the right, standing with his arms raised and pointing towards the upper right. The woman is on the left, standing with her arms raised and pointing towards the upper left. The overall composition is clean and minimalist, emphasizing the human form against the natural sky.

minerals make more of life

EUROMINES Steering Committee

June 2006- June 2008

President:

TOM NIEMI

Boliden, Sweden

Vice President:

NORBERT SCHÄCHTER

Vereinigung Rohstoffe und Bergbau e.V; Germany

Vice President:

ANDERS FURBECK

LKAB, Sweden

Vice President:

DOMINIQUE BAMAS

Rouiller, France

Member:

THOMAS DRNEK

RHI Refractories, Austria

Member:

DORIAN EMMETT

Anglo-American, UK

Member:

HERBERT WIRTH

KHGM Polska Miedz, Poland

Member:

GUY THIRAN

Eurometaux

Member:

CORINA HEBESTREIT

Euromines



Table of contents

Foreword by the President	1
1. European resources at YOUR fingertips	2-7
1.1 The exploration boom in Europe continues	3
1.2 New projects, new mines and extensions	3-6
1.3 Innovation & ETP SMR	7
2. The license to operate in Europe - contributing to Europe's cohesion and integration	8-10
2.1 Corporate Social responsibility - the European style	8
2.2 The Social dialogue at European extractive industry level	8-9
2.3 Relations with local and regional governments: the European Network of Mining Regions	9-10
3. The license to operate in Europe - contributing to Europe's natural resources	11-13
3.1 Implementation of the Directive on the management of waste from the extractive industry	11
3.2 Implementation of E-PRTR	11
3.3 European Soil Legislation	11-12
3.4 Halting the Loss of Biodiversity by 2010	12
3.5 The new Chemicals Policy - REACH	13

Foreword by the President

It is a pleasure that I, as President of EUROMINES, - for the third year - can conclude that the extractive industry has had a very successful year. Since the recovery of especially the metals mining industry started already in 2003, I think we are already talking about a "supercycle" that we have never seen before.

The continuing good market situation for our products has put very much pressure on different functions in our industry. Exploration, permitting, environmental studies, construction, operation and last, but not least the human resources have had to develop very fast to meet the demands of higher volumes of our products.

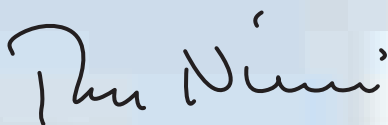
Education and training, research and development at our universities and schools have not yet been able to catch up with the need of the extractive industry. In this sense it is very important that we take an active role in helping the sector to as soon as possible both attract and actually employ young people to join our industry.

The modern society we are living in is becoming more and more demanding as to the "sustainability" of any industry. For the extractive industry this means that we do not only have to adopt rules and regulations in the areas where we are operating, we need to be much better than that; we need to be an industry that is considered to be needed, to be operating as a "good citizen" with the aim to hand over a better world to the next coming generations.

EUROMINES plays an important role in making sure that our industry has a good future especially in Europe. The role includes dealing with a whole spectrum of issues, from "licence to operate", development of our products according to the needs of our customers as well as making sure that the "footprint" of the industry is as limited as possible. The work is very much about collection of information to be distributed to our members, lobbying within the EU to assure legislation develops so that we are able to operate, and distributing the message of sustainability.

Especially the large quantity of information that EUROMINES has been dealing with puts pressure on the relatively small staff. Our members naturally want to see that EUROMINES does both screen and manage the information flow in such a way that the members are able to catch the essentials. A special thank you should be given to the staff of EUROMINES for having dealt well with these challenges during 2006.

Tom Niemi, President



1. European resources at YOUR fingertips

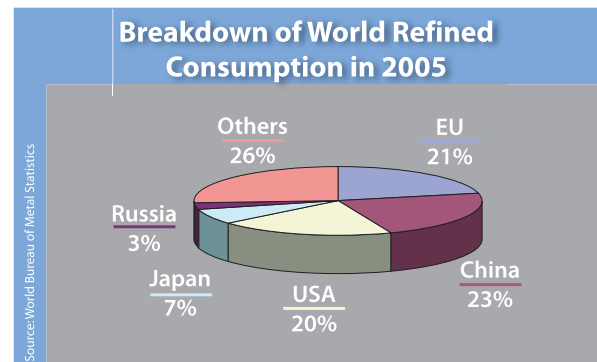
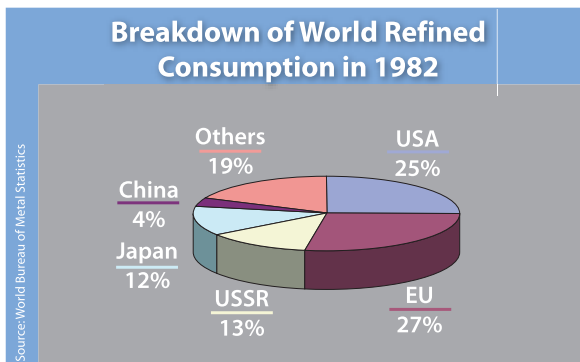
The majority of European extractive companies had a good year in 2006. Prices for commodities reached historical highs and, because of a recovery of most economies in Europe, markets and demand were strong.

The continued surge in demand for raw materials from Asia created shortages in some areas which were followed by price increases in many commodities.

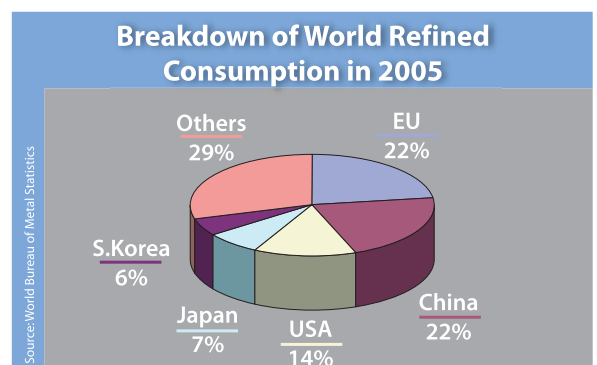
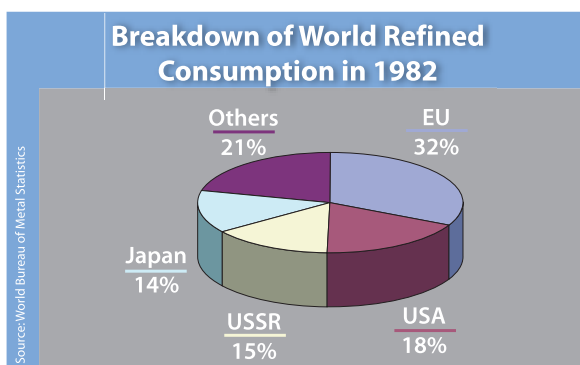
One reason for the growing consumption is indeed the continuous increase in demand in Asia. A comparison of the development of selected metals consumption over the last 23 years clearly indicates where the markets of tomorrow will be.



Aluminium consumption

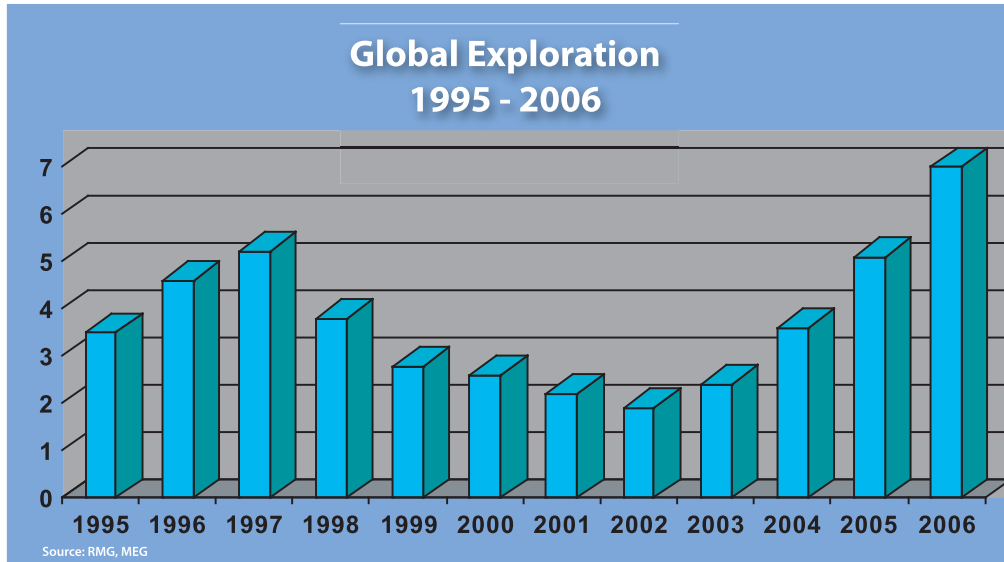


Copper consumption



1.1 The exploration boom in Europe continues

As a consequence of prices and demand, the worldwide exploration continued to grow, but of course exploration in Europe was not as extensive as in other parts of the world. There are many more projects and mine expansions registered in 2006, indicating that the exploration boom in Europe continues.

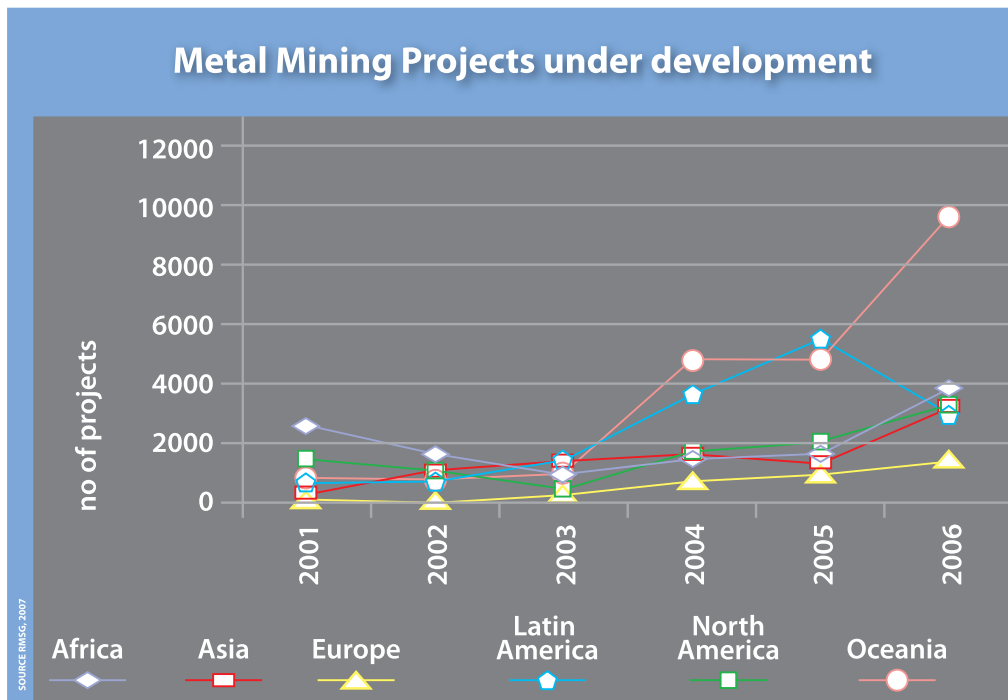


1.2 New projects, new mines and extensions

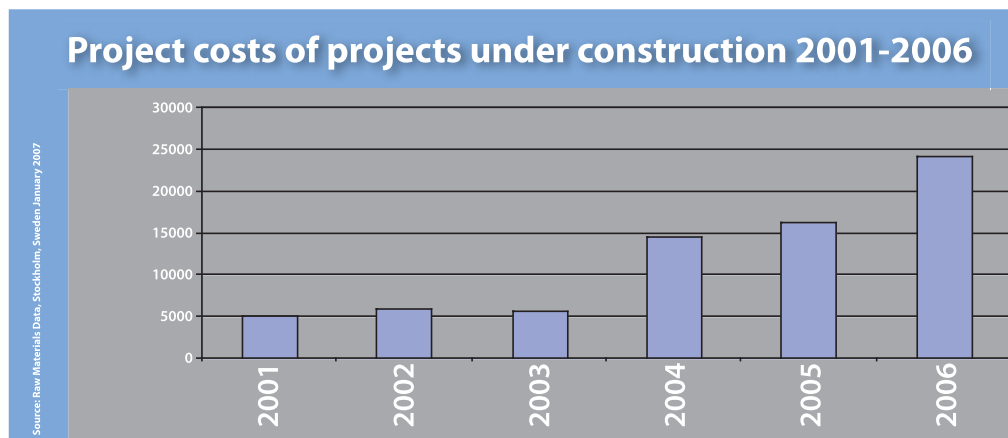
The boom has also led to further development and investments in ongoing projects, new mines and the extension of existing mines. For the second succeeding year companies are earning the money to make investments for the future.

At the same time more new projects are being announced at higher values and known projects are continuously reporting cost increases. These increases relate both to expanding the project size and increases in costs of labour and materials. These trends look likely to continue over the coming couple of years especially as ore bodies in Europe become deeper, involve lower grades and are located in

more remote regions, while the acquisition of permits for quarry extensions takes longer and is more tedious.



Costs for mine development have increased worldwide as a result of the geology, environmental and social costs, but also because of the time and manpower involved in satisfying the legal requirements.



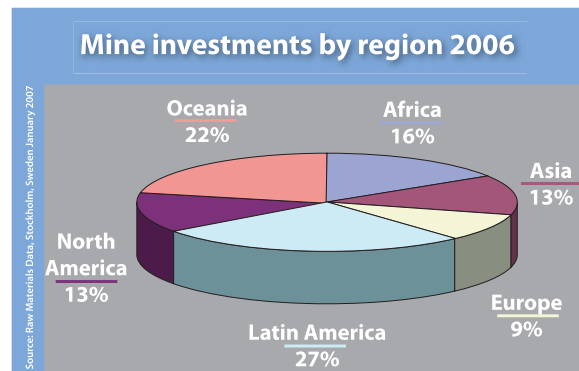
In particular, implementation of the EU Directive on Environmental Impact Assessment and complications in achieving compatibility with nature protection areas such as the Natura 2000 sites has increased permitting times and costs in Europe substantially. This proportion will continue to grow if the EU does not simplify the process within its framework of better regulation.

On average, permitting has increased from a period of 6 months in the 70s to more than 3 years today. In some European countries the whole mine development can take 7-8 years.

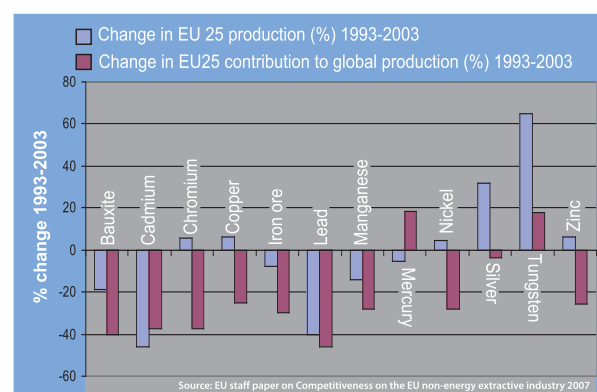
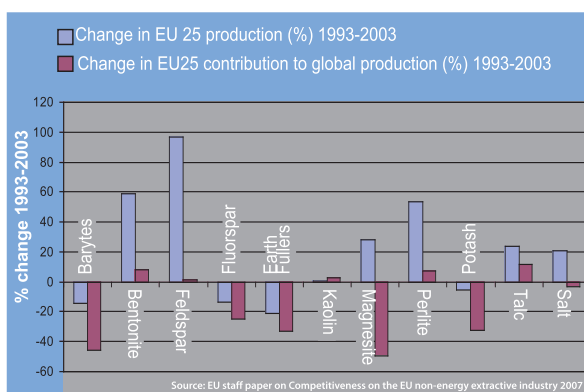
In particular the absence of the concept of "overriding public interest" in the case of mineral extraction is of growing concern to the sector. The public consultation process coupled with pressures on local politicians tends to dominate the permitting process and interferes with the supply issue for the national economies and for Europe as a whole. Whilst the need for public participation is undisputed by the industry, constraints deriving from the location of geological deposits demand greater central policy leadership. The "nimby" attitude threatens to jeopardise the sustainable supply from local sources and risks the export of environmental and social issues.

A better coordination of national mineral supply policies and an EU self-sufficiency approach coupled with a proximity principle for supply to the market could be the right policy approach. This way the future supply of mineral resources to EU markets can be ensured and it can be avoided that companies are required to solve national issues within single development applications.

In 2006, comparing worldwide investments in metal mining Europe represents 9 % of all global investments; the lead is held by Latin America.



Much more investment in Europe will be required to redress the negative trade balances in many metals and minerals.



This is the issue that was also addressed by the DG Enterprise staff working paper that was developed further in 2006 and which will be used as a background for the discussions of the High Level Group on Competitiveness, Energy and the Environment in 2007. Equally its working group No 10 established at the end of 2006 will examine access to resources, secondary raw materials and wastes and will try to develop recommendations for the High Level Group.



In preparation for this upcoming work the Euromines Sustainable Development and Image Committee identified a series of factors that influence competitiveness and tried to develop its own recommendations which were forwarded to the Commission.

1. Value of the resources

Geological deposits determine the location of extractive operations.

The economic viability of deposits is determined by several factors:

- the type and grade of the raw material,
- the depth of the deposit - in terms of grade versus extraction costs,
- extraction methodology - technical process/design that can be used for the extraction,
- availability of new techniques - R&TD.

2. Access to the resources

Concerning the access to the resources here are the key factors influencing the competitiveness:

- land access,
- necessary investments - investments in the exploration,
- level of exploration activity in a particular area,
- mine development costs - long and expensive planning stage, EIA etc.,
- availability of infrastructure - cost of transport, freight costs.

3. Operating costs

manpower/human resources:

- personnel costs - cost of work hour,
- costs of H&S protection,
- availability of skilled workforce,

production costs:

- energy supply,
- machinery,
- availability of new techniques - R&TD,
- financial guarantees (waste, rehabilitation etc.) - connected with legislation.

4. Legislative provisions

Condition: stable and predictable legal framework

- EU legislative framework,
- Member State legislative framework / national level,
- requirements of local authorities.

5. Market demand

- existence of downstream industry,
- consumer behaviour.

Euromines is eagerly anticipating the full recommendations that will be developed in 2007, which should provide an important element in the discussion about the Thematic Strategy on the Sustainable Use of Natural Resources in 2007.

1.3 Innovation & ETP SMR

Without research, new technical developments and innovation the future supply of resources will not be possible. The industry as a sector has been involved therefore for many years in cooperative research within the EU's RTD framework programmes.

As a result of the networking of the former NESMI partners, the European Technology Platform for Sustainable Mineral Resources (ETP SMR) was established in 2005. In 2006 the platform addressed the supply issues Europe faces. Being one of the core suppliers for downstream industries and the foundations for the overall wealth of our society the ETP SMR developed a Strategic Research Agenda and organized exchanges with stakeholders on a regular basis. In March 2006 the event took place in the minerals department of the Museum of Natural Sciences in Brussels and attracted some 100 participants. Representatives of the European Commission and Parliament, the minerals sector, technology providers and downstream users participated and discussed ideas and concepts. The platform was very active in 2006 and issued several publications, amongst which was the brochure "A policy contribution" describing how innovation in the mineral resources sector contributes to the overall policy goals of the EU.

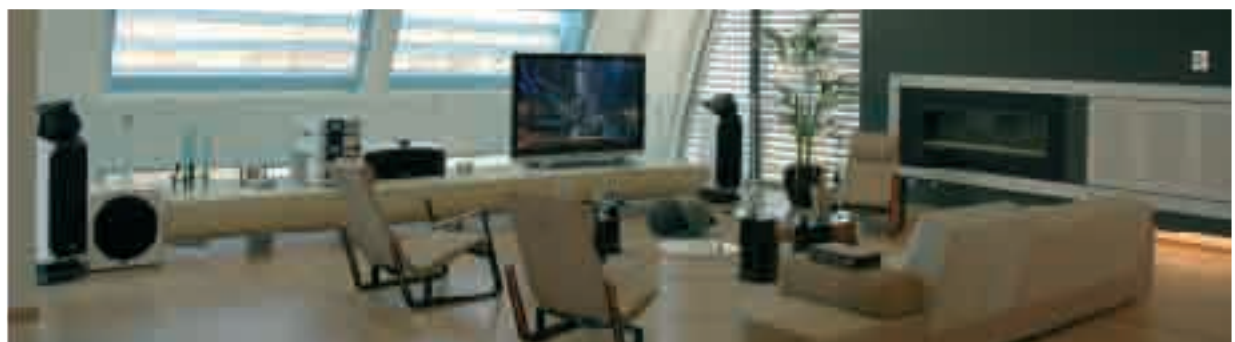


**EUROPEAN TECHNOLOGY PLATFORM
ON SUSTAINABLE MINERAL RESOURCES**

The ETP SMR will continue to work on these issues in 2007. The next stakeholder event will take place in June in the House of Living Tomorrow. The innovative approach of this House - and the role the extractive industry has in this - will be illustrated with examples from the construction, minerals and metals industries. It is the result of creating and marketing new innovative products and services in promising areas, the so-called "lead markets".



Research is often the basis for innovation and progress. The EU has encouraged its Member States for years to invest 3% of the GDP in research and has recently started discussing tax incentives for industry to support research investments. DG Research is responsible for the EU research-funding programmes that support industry in this task and the total budget dedicated to Framework Programme 7 for the period 2007-2013 amounts to 50.521 million Euros. New calls for projects are published every year. It is the objective of the ETP SMR to inform its members about the calls published, while also striving to have its projects directly included in the calls as recognition of the sector's innovative capacity.



2. The license to operate in Europe - contributing to Europe's cohesion and integration

The challenges for European operations in terms of environmental and social performance continue. The sector has addressed jointly a number of issues and continues to make progress.

2.1 Corporate Social responsibility - the European style: the first European wide multi-sectoral Social dialogue agreement

The association actively participated in the negotiations on the multi-sectoral social dialogue "Agreement on Workers Health Protection through the Good Handling and Use of Crystalline Silica and Products containing it". From the start of the initiative the Euromines members recognised that in a number of Euromines member companies workers could be exposed to respirable crystalline silica when mining metals or minerals and therefore seconded representatives for the technical and steering working group parties. The agreement was finally signed on 25 April 2006 and entered into force on 25 October 2006. While the steering working group was responsible for preparing the overall agreement, the technical working group composed good practice sheets for each and every action performed at work. For the mining industry this resulted in some 11 specific task guiding sheets describing the current good practice when mining, handling or storing material containing respirable crystalline silica. These sheets will be updated when new technologies and working modes are applied. In order to facilitate the distribution and application at local level, the agreement and the good practice guide have been translated into 19 EU languages.

By signing the agreement Euromines and its members have committed themselves to firstly making a risk assessment and to secondly, where necessary, applying the good practices. These activities will be reported to the NEPSI Council where employers' and union representatives will jointly monitor the application of the agreement. Reports of the work will be communicated to DG Social Affairs.



2.2 The Social dialogue at European extractive industry level

The standard cooperation and exchange with the union representatives is institutionalised in the Sectoral Social Dialogue Committee for the Extractive Industry (SSDCEI).

In 2006 great effort was applied to establishing an overview of the activities undertaken by the extractive industry in the field of Corporate Social Responsibility. A survey conducted within the Euromines membership showed that such activities included many activities directed towards the employees, the environment and the community.

Initiatives towards the employees can range from direct communication through intranet and in house magazines to professional guidance for employees' children. In some cases the employees receive housing, in other cases free transport to the workplace is provided. Apart from the regular job training sessions, employees are given the opportunity to acquire language and other professional skills.

Health wise, employers are observed to provide free of charge sports facilities for their employees or to arrange special health programmes. Cultural programmes and sports activities are sponsored and are of benefit to the whole community. The wider environment is addressed through numerous environmental protection programmes. The public is often involved in the development of these activities.

2.3 Relations with local and regional governments: the European Network of Mining Regions

The Network of European Mining Regions (ENMR) was conceived to create a platform for information exchange amongst regions strongly dependant on mining operations and with their industrial partners. The ENMR objectives were to

- form and strengthen mining region partnerships,
- increase collaboration and sharing of best practices between partners and members,
- achieve recognition of mining regions as European Union policy stakeholders.

Approved as a network for EU funding under the Interreg III C in 2004, the programme ran originally until the end of 2006, but is now extended till June 2007. The network had 16 partners from 9 countries and 10 additional associate members.



At the end of 2006 the network summarised its activities and findings during a conference in Brussels and noted that for many regions in Europe mining is still a socio-economic engine.

Over the 2 years 48 regional workshops (four per region) had been held, 12 regional studies (one per region) had been held, 12 thematic working groups (four per theme) concentrated on specific issues and the results were communicated in European workshops. The work of the network provided a balanced focus on three themes:

- **Socio-economics,**
- **Environment,**
- **Industry.**

Three analyses and studies were produced on:

- **Strengths, Weaknesses, Opportunities and Threats (SWOT) of the respective mining regions,**
- **Trends and Scenarios for the development, and a**
- **Synthesis of the partners' regional studies.**

All of this activity, plus data from various Commission services and other sources, culminated in recommendations to the EU through the ENMR Roadmap document.



The conference in November 2006 concluded that it was important to

- **Continue and strengthen the European Network of Mining Regions as a platform with a strong presence in Brussels**
 - ▶ **Objective:** *Enhance the European mining regions' contribution to the European Union's socio-political dialogue;*
 - ▶ **Objective:** *Influence global raw materials supply policies on behalf of minerals-dependent European industries;*
 - ▶ **Objective:** *Develop and maintain a balanced approach to mining and related industries in Europe;*
- **Provide a platform within the ENMR for the sharing of knowledge with regard to the implementation of environmental legislation and the remediation of mining legacies**
 - ▶ **Objective:** *Increase environmental management competence through increased use of European and global environmental management knowledge assets and expertise;*
- **Provide a platform within the ENMR for the sharing of knowledge with regard to social and economic planning and development throughout the mining lifecycle**
 - ▶ **Objective:** *Increase social and economic development and planning competence through the increased use of European and global knowledge assets;*
- **The European Commission should undertake the development and promotion of an EU-level mineral policy and raw materials supply strategy**
 - ▶ **Objective:** *Increased exploration and mine development within European mining regions to improve the security of the raw materials supply for European manufacturing industries;*
 - ▶ **Objective:** *Increase European Union support for the formation and development of mining clusters in European mining regions.*

Results to be achieved

- Increased raw materials supply security,
- Economic development and diversification in mining regions,
- Increased technology and equipment development,
- Improved environmental practices and technologies,
- Improved socio-economic planning,
- Improved land-use planning.

At the same time the following would be achieved:

EU economic benefits:

- Improved balance of trade,
- Internal market development,
- Increased employment,
- Increased tax revenues.



3. The license to operate in Europe - contributing to Europe's natural resources

Key issues for the industry in 2006 were environmental protection issues such as the implementation of the Directive on the management of waste from the extractive industry, the discussions about water management and soil directives as well as the new EU's chemicals policy called REACH.

3.1 Implementation of the Directive on the management of waste from the extractive industry

As for the development of the European Best Available Techniques Reference document for the management of tailings and waste rock in previous years, the mining industry has continued to be the main contributor to the further development of a stand-alone legal framework for the regulation of wastes in the extractive industries.

Following the adoption of the directive in early 2006, Euromines has made its contribution to the development of technical guidance notes for the implementation of Directive 2006/21/EC its top priority. Whilst progress within the Technical Adaptation Committee (consisting of national experts from the Member States) has been slow, the TC 292 WG 8 of the Committee for European Norms (CEN) has received a formal mandate to prepare sampling & testing methods for the characterisation of extractive wastes. The main focus of the work is a general method for the prediction of acid rock drainage and a method for monitoring cyanide emissions from gold processing plants. Euromines has been and will continue to be an active contributor to the CEN work and will be preparing illustrative examples of typical sampling scenarios for discussion before the summer. Equally Euromines is contributing to the studies commissioned by the Commission to develop risk assessment methodologies for classifying "Category A" facilities under the Directive, as well as guidance notes for financial guarantees and inspections.

3.2 Implementation of E-PRTR

2007 will be the first year for which data will need to be reported on the new E-PRTR. In November 2006 Euromines Environment Committee met especially to identify critical issues concerning the reporting requirements and decided that agreed methods were needed to report emissions of PM10 from mine sites. An outline of a proposed calculation method was agreed, which will now be developed into a Guideline document for member companies to discuss with their competent authorities. As a first check, Euromines is conducting a literature review to compare the proposed calculation method to any methods for reporting dust emissions that may have already been developed elsewhere. The Euromines Guideline is expected to be published before the summer 2007.



3.3 European Soil Legislation

Soil structure, erosion, fertility and biology are just as important for mine management and rehabilitation as they are for other sectors, such as agriculture, forestry and conservation. Consequently,

soil research in the mining and mineral industry can make important contributions towards protection of soil resources in the EU.

The mining industry generates many challenges in all aspects of soil science and, in turn, supports substantial soil research, which is regularly published in peer-reviewed journals of international renown.

The adoption of a proposed Soil Framework Directive by the European Commission in September 2006 has therefore proven to be very controversial. After months of delay in inter-service consultation, the resulting proposal has angered many industrial sectors, confused MEPs and concerned key Member States. The proposal appears to have been overly influenced by a cursory internet consultation, which identified contamination as the most important threat to soil, without sufficiently considering overlaps with existing EU and Member State legislation. E.g., mine waste facilities would be subject to identification, investigation, risk assessment and remediation under the existing Directive 2006/21/EC and again under the new Soil Framework Directive.

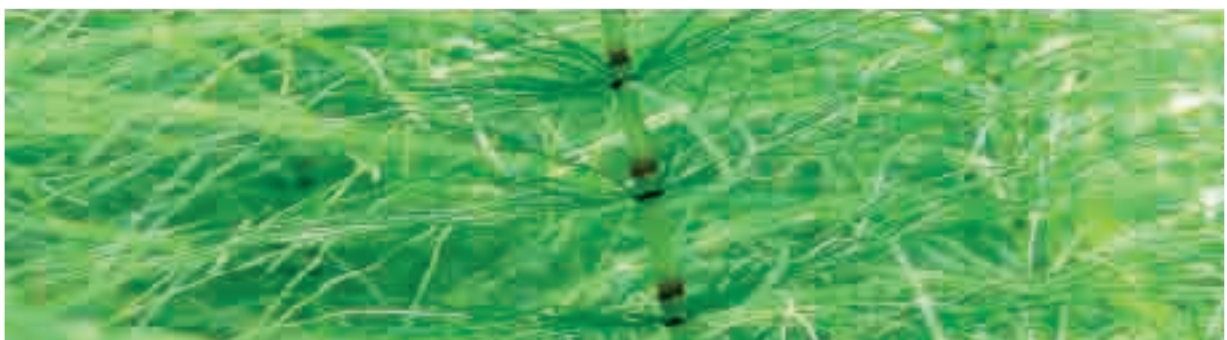
As a result, there is widespread concern that the proposed Directive will be unable to meet its stated objectives. Euromines holds the position that soil issues are best dealt with at local and regional level and intends to share its experiences in best-practice soil management to contribute to a better solution.

3.4 Halting the Loss of Biodiversity by 2010



The adoption, in May 2006, of the European Commission's latest Communication on Halting the Loss of Biodiversity by 2010 was the latest in a long sequence of events that led to Euromines deciding to form a new committee to work on longer-term issues of land-access; the "Resource-Access Committee".

The Committee will engage in the European debate on biodiversity and should bring to bear the wealth of knowledge and experience that the mining industry has in this field. In recent years Euromines has co-operated closely with the ICMM and supported the development of their Good Practice Guidance for Mining and Biodiversity, which was distributed to member companies in 2006. The Resource-Access Committee is keen to further promote the Guidance in Europe and contribute to the follow-up work to the European Commission's recent Communication. In particular, there is a need to ensure that the development of EU biodiversity indicators is based on sound science.



3.5 The new Chemicals Policy - REACH

In 2006 much effort went into lobbying for better recognition of the differences between the majority of chemicals used in the EU and the inorganic raw materials produced by the mining industry. Together with many European and international organisations the legislative process was accompanied very closely and in the end quite successfully. Minerals, ores & ore concentrates have been exempted from Registration and Evaluation under REACH, which will remove substantial short-term burdens from the European economy without detracting from the overall objectives of the Regulation.

In recent months, the entire Euromines Secretariat has been very active preparing its members for more general implementation of the REACH Regulation, which was finalised in December and will enter into force on 1 June 2007.

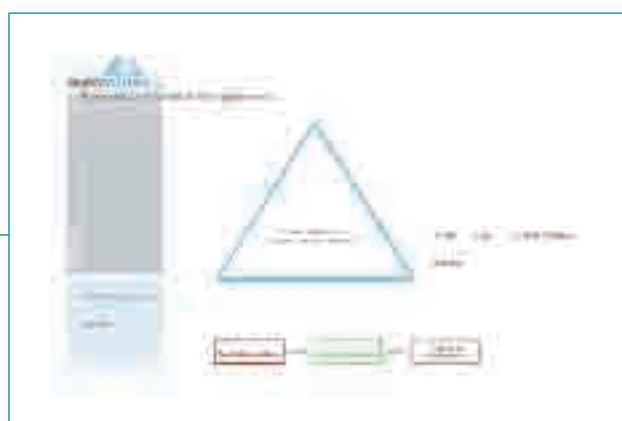
In particular, Euromines has developed a web-based information tool, dubbed the "Virtual REACH Mine", which is designed to provide rapid understanding of how particular substances, produced or used in the mining industry, are affected by the REACH Regulation. Euromines members can access the tool through their website (<http://www.euromines.org>)

Member Workshops were held in September 2006 and again in January 2007 to work through some of the most important interpretation issues. Euromines also spent considerable time encouraging debate of the same issues within the wider metals & minerals industries such that over time, differences in interpretations could be minimised before individual companies faced the first legal commitments of REACH.

Of particular concern, is the correct interpretation of the various exemptions granted to minerals, ores & ore concentrates. The remainder of the spring 2007 will be spent continuing this work and contributing to the ongoing REACH Implementation Projects (RIPs) that influence it. The implications of REACH for mining companies will be presented at the next ICMM and World Magnesite (MAGMIN) meetings in May 2007.

Euromines will also be preparing for a review, by the European Commission, Member States and Parliament, of a number of key Annexes to the Regulation during the second half of 2007. The review is intended to clarify certain exemptions (e.g. for synthetic minerals) and it is hoped that industry will have an opportunity to contribute the results of its recent interpretation work.

Virtual REACH Mine - www.euromines.org



Euromines members

Direct Members Associations

Mr. Herbert Bardach
Wirtschaftskammer Österreich
Wiedner Hauptstrasse 63
A - 1045 Wien
AUSTRIA
Phone: +43 5909003310
Fax: +43 5909003378
E-mail: Herbert.bardach@wko.at

Mr. Olavi Paatsola
FAERI
Runkopolku 4
SF - 71800 Sillinjärvi
FINLAND
Phone: +358 174624784
Fax: +358 174624784
E-mail: olavi.paatsola@dnainet.net

Mr. Christos Kavalopoulos
Greek Mining Enterprises Association
Vassileos Georgiou B & Rigilis Street 10
GR - 10674 Athens
GREECE
Phone: +30 2103638318
Fax: +30 2103634019
E-mail: sme@hol.gr

Dr. Ákos Zoltay
Hungarian Mining Association
Margit Circle 85
H - 1024 Budapest
HUNGARY
Phone: +36 13367801
Fax: +36 13367801
E-mail: mbsz@axxero.hu

Mr. Sean Beary
Irish Mining Exploration Group
Confederation House, 84/86 Lower
Baggot Street, Dublin 2
EI - Dublin
IRELAND
Phone: +353 16051500
Fax: +353 16601717
E-mail: sean.beary@ibec.ie

Mr. Mutlu Öktem
IMMIB
Dip TİYARET KOMPLEKSİ - A-Blok
Çobançebme Mevkii, Sanayi Cad,
Yenişirina Bahçelievle
TR - 34530 Istanbul
TURKEY
Phone: +90 2124540000
Fax: +90 2124540001
E-mail: immib@immib.org.tr

Mr. Robert Fenton
Mining Association of the United
Kingdom
78 Copt Heath Drive Knowle, West Midlands
GB - B939PB Solihull
UNITED KINGDOM
Phone: +44 1564205079
Fax: +44 1564205079
E-mail: bob.fenton@mauk.org.uk

Mr. Karel Lorek
Těžební Unie/Mining Union
Slavčokova 827/1a
CZ - 63800 Brno
CZECH REPUBLIC
Phone: +420 0545211014
Fax: +420 0545114205
E-mail: unie@tzebni-unie.cz

Mr. Fedor Boroška
Slovak Mining Chamber
Matice slovenskej, c. 10
SK - 97101 Prievidza
SLOVAK REPUBLIC
Phone: +421 421 465421682
Fax: +421 421 465421682
E-mail: sbk@hbp.sk

Mr. Tomas From
SVEMIN
Kungsträdgårdsgatan 10, P.O. Box 1721
S - 11187 Stockholm
SWEDEN
Phone: +46 87626715
Fax: +46 86116264
E-mail: Thomas.from@svein.se

Mr. Ismet Kasapoglu
Turkish Miners Enterprises Association
İstiklal Caddesi Tunca, Apt. No. 47/1-1
Tünel, Beyoğlu
TR - 34840 Istanbul
TURKEY
Phone: +90 2122451503
Fax: +90 2122938355
E-mail: turkiyemaden@ixir.com

Dr. Norbert Schächter
Vereinigung Rohstoffe und Bergbau e.V.
Am Schillertheater 4
DE - 10597 Berlin
GERMANY
Phone: +49 3031518241
Fax: +49 3031518252
E-mail: n.schaechter@rw-bergbau.de

Mr. Hartmut Behnsen
Verband der Kali- und Salzindustrie
e. V. (VKS)
31, Rue du Commerce
B-1000 Brussels
BELGIUM
Phone: +32 22908985
Fax: +32 22908974
E-mail: m.steinlage@bd-online.de

Mr. Petar Petrov
Bulgarian Mining Chamber
205, Al. Stambolski Boulevard, Office 30
BG-1309 Sofia
BULGARIA
Phone: +359 28229372
Fax: +359 28229373
E-mail: bmc@mb.bia-bg.com

Mr. Alan R. Hill
Rosia Montana Gold Corporation
321, Piata Street, Alba County
RO-517615 Rosia Montana
ROMANIA
Phone: +40 258859302
Fax: +40 258859301
E-mail: john.aston@rmgo.ro

Direct Members Companies

Mr. Dorian Emmett
Anglo American Plc
20 Carlton House Terrace, St. James
GB - SW1Y5AN London
UNITED KINGDOM
Phone: +44 2076988732
Fax: +44 2076988560
E-mail: demmett@angloamerican.co.uk

Mr. Tom Niemi
Boliden AB
P.O. Box 44
S - 10120 Stockholm
SWEDEN
Phone: +46 86101528
Fax: +46 8315545
E-mail: tom.niemi@boliden.com

Mr. David Reading
European Goldfields Services
Level 3, 11, Berkeley Street
GB - W1J8DS London
UNITED KINGDOM
Phone: +44 2074089534
Fax: +44 2077637149
E-mail: dr@goldfields.com

Mr. David Pybus
Cleveland Potash
Boulby Mine,
Loftus Saltburn-by-the-Sea
GB - TS134UZ Cleveland
UNITED KINGDOM
Phone: +44 1287640140
Fax: +44 1287640934
E-mail:
david.pybus@clevelandpotash.co.uk

C/o Mr. David Pybus
Iberpotash
Boulby Mine,
Loftus Saltburn-by-the-Sea
GB - TS134UZ Cleveland
UNITED KINGDOM
Phone: +44 1287640140
Fax: +44 1287640934
E-mail:
david.pybus@clevelandpotash.co.uk

Dr. Herbert Wirth
KGHM Polska Miedz
Ul. Marii Skłodowskiej Curie 88
PL - 59301 Lubin
POLAND
Phone: +48 76847836 ; 717812357
Fax: +48 7684 8500 ; 717812357
E-mail: h.wirth@kgm.pl

Mr. Anders Furbeck
LKAB
Varvsgatan 45 Box 952
S - 97126 Lulea
SWEDEN
Phone: +46 92038178
Fax: +46 703196113
E-mail: anders.furbeck@lkab.com

Associate Members · Associate Members Association Companies

Mr. Eduardo Jimenez Dominguez
Magnesitas de Rubian
Ctra. Comarcal 546, km 35, Villa de
Mouros (O Inco)
E - 27341 Lugo
SPAIN
Phone: +34 982424211
Fax: +34 982424250
E-mail: commercial@mgr.es

Mr. Nicolas Gangutia
Magnesitas Navarras
Avenida Foncesvalles, s/n, Zubiri
E - 31630 Navarra
SPAIN
Phone: +34 948421617
Fax: +34 948304253
E-mail:
d.bamas@magnesitasnavarras.es

Mr. Otto Krediet
Nedmag Industries
Biltionweg 1 P.O. Box 241
NL - 9640 AE Veendam
NETHERLAND
Phone: +31 598651200
Fax: +31 598452484
E-mail: O.Krediet@nedmag.nl

Mr. David Baril
Rio Narcea Gold Mines
C/Secundino Roces Riera,3-2º,
Centro de Empresas Aspo 1
E - 33860 Cayes-Llanera-Asturias
SPAIN
Phone: +34 985831500
Fax: +34 985832159
E-mail: david.baril@rimg.es

Mr. Shaun Stewart
Rio Tinto Plc
6, St. James's Square
GB- SW1Y4LD London
UNITED KINGDOM
Phone: +44 2077532348
Fax: +44 2077532288
E-mail: shaun.stewart@riotinto.com

Mr. Jonathan Goodman
Dundee Precious Metals Inc.
200 Bay Street, Ste. 3060
Royal Bank Plaza, South Tower
CAN - ON M5J 2J1 Toronto
CANADA
Phone: +1 4163652408
Fax: +1 416 365 5631
E-mail:
Jgoodman@dundeeprecious.com

Mr. Joseph Ringwald
Tournigan Gold Corp
24th floor
1111 West Georgia Street
CAN - BC V6E 4M3 Vancouver
CANADA
Phone: +1 6046838320
Fax: +1 6046838340
E-mail: Jringwald@tournigan.com

Mr. Peter Huxtable
Barytes Association
Jacaranda, 10 Brockfields, Calver,
Hope Valley
GB - S323XB Derbyshire
UNITED KINGDOM
Phone: +44 1433639879
Fax: +44 1433639879
E-mail: barites@aol.com

Mr. Daniel Surulescu
PATROMIN
Str. Timisoara, No. 2
RO - Petrosani
ROMANIA
Phone: +40 254541460
Fax: +40 254541315
E-mail: surulescu@cnrh.ro

Mr. Andreas Jäger
Euroslate
Barbarastrasse 3
DE - 56727 Mayen
GERMANY
Phone: +49 2651955112
Fax: +49 2651955200

Dr. Jack Testard
BRGM
3, Avenue Claude Guillemin BP 6009,
Cedex 2
F - 45060 Orléans
FRANCE
Phone: +33 238643493
Fax: +33 238643861
E-mail: j.testard@brgm.fr

Mr. Mike Cambridge
Cantab Consulting Kent
51, Albert Road Ashford
GB - TN248NU Kent
UNITED KINGDOM
Phone: +44 1233646186
Fax: +44 233646186
E-mail: mcambridge@cantabkent.co.uk

Mr. Frank Harenburg
Cyplus GmbH
Rodenbacher Chaussee 4
DE - 63457 Hanau-Wolfgang
GERMANY
Phone: +49 6181596927
Fax: +49 6181596940
E-mail: frank.harenburg@cyplus.com

Mr. Alain-Louis Dangeard
MEED
51, Rue Spontini
F - 75116 Paris
FRANCE
Phone: +33 147044237
Fax: +33 147556723
E-mail: aldan@wanadoo.fr

Mr. Vasisli Nicoletopoulos
Nicoletopoulos Consulting
11 Maiandrou St.
GR - 115 28 Athens
GREECE
Phone: +30 2107241886
Fax: +30 210 7241292
E-mail: vasa@helix.gr



asbl, Avenue de Broqueville, 12 B-1150 Bruxelles
Phone: +32 2 775 6331 Fax: +32 2 770 63 03
euromines@euromines.be
www.euromines.org

Graphic Design V.D.H.O. +32 475 60 30 74 Brussels - Belgium
Printed by Breuerdruck, Düsseldorf - Germany



asbl, Avenue de Broqueville, 12 B-1150 Bruxelles
Phone: +32 2 775 6331 Fax: +32 2 770 63 03
euromines@euromines.be
www.euromines.org

Graphic Design V.D.H.O. +32 475 60 30 74 Brussels - Belgium
Printed by Breuerdruck, Düsseldorf - Germany