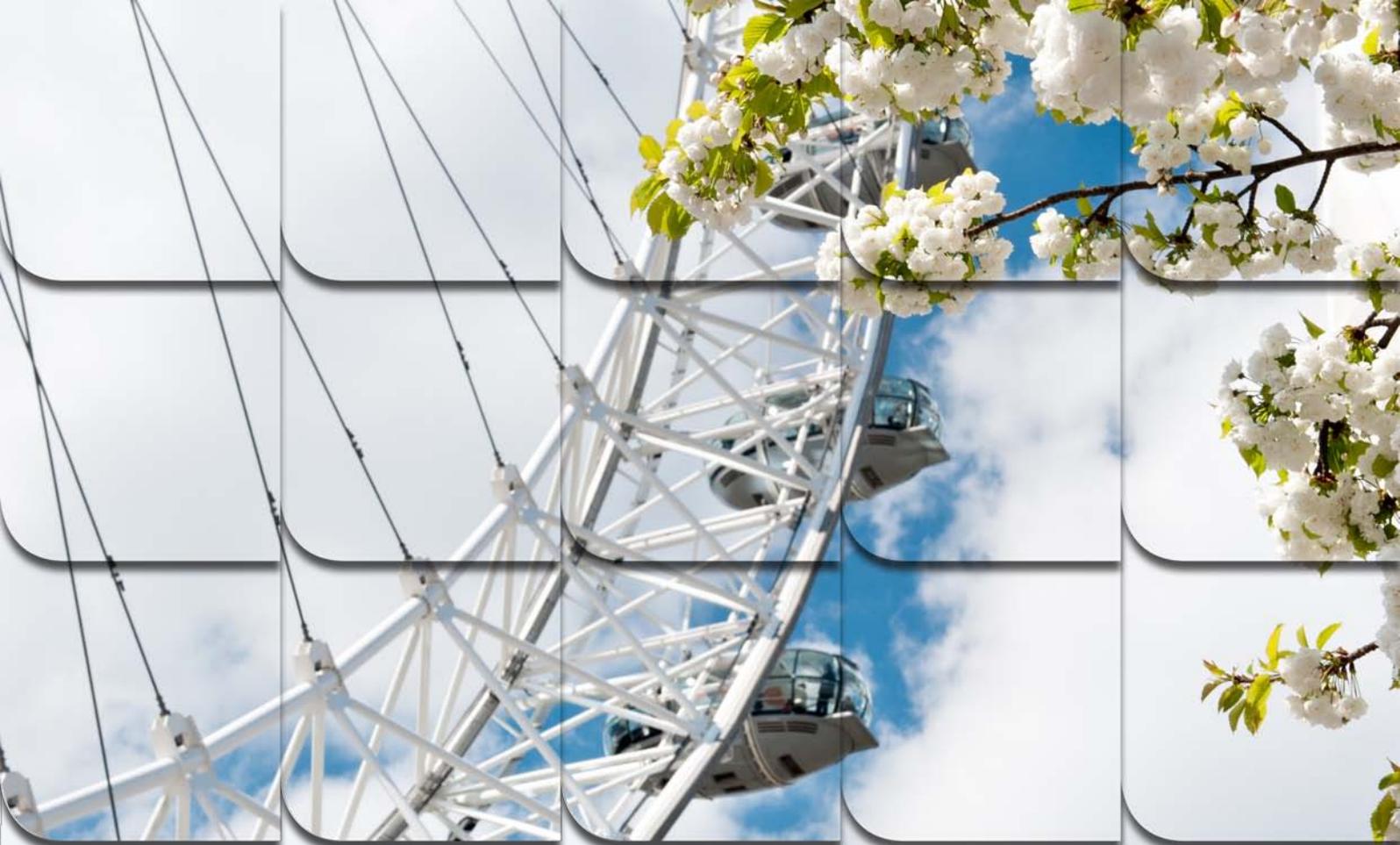


The logo for euromines, featuring a stylized blue mountain peak above the company name in a blue sans-serif font.

BEFORE IT'S YOURS,
WE MINE IT.

EUROMINES ANNUAL REPORT 2013





FOREWORD



Europe is undergoing a painful transition. So many of the old received dreams, certainties and wisdom have been swept away and replaced by a much more unpredictable and challenging world. And yet, Europe still produces 75% of the raw materials used in its exports. Europe still has a viable resource base. Europe still has enviable intellectual and technological capital and Europe has truly tremendous people.

European mining demonstrates that every day. It competes in an increasingly difficult global market for sales, supplies, capital and people. Europe's companies do not have the state support or even the image that competitors may still enjoy, they operate under the most stringent regulatory standards in the world and yet still innovate, compete and deliver consistently excellent performance. Every day.

Euromines has also changed, it has become much more focused on delivering concrete consistent and constructive results where they matter most to its members. The following pages illustrate some of what we now do.



But we have so much more to do. To strive for a robust and reliable and legal framework for mining in all of the EU Member States. To promote new investment in exploration and knowledge. To continue research and technology development. To show the world how to mine deeper, smaller and more complex deposits successfully. Every day.

More importantly we need public acceptance of the industry that provides so much value, so many benefits to the EU. 2014 must see us redouble our efforts to communicate what we do. Every day.

I am honoured to serve as President of Euromines, I am truly proud of what our industry does. We build a future for the children of Europe. Every day.

Mining is essential to the future of Europe. Believe it.

Mark Rachovides
President of Euromines

A handwritten signature in black ink, appearing to read 'Mark Rachovides', written in a cursive style.

THIS IS WHO WE REPRESENT

EUROMINES IN BRIEF

Euromines is the recognized representative of the European metals and minerals mining industry. The members' main objective is to promote the industry and maintain their relations with European institutions at all levels. Euromines provides services to its members with regard to EU policy and forms a network for cooperation and the exchange of information throughout the sector within Europe. The association also supports contacts with the mining community throughout the world.

Euromines members are large and small companies who with their subsidiaries in Europe and in other

parts of the world provide jobs to more than 350,000 people. Their activities and operations produce more than 42 different metals and minerals.

For some metals and minerals, Europe is the world's leading producer.

The association is based in Brussels and holds membership meetings twice a year. Its committees and working groups meet regularly throughout the year. Euromines also follows trade and investment issues for the mining industry both inside and outside of Europe.

EUROMINES MEMBERS' MISSION

- To promote sustainable and prosperous mining in Europe through operational excellence;
- Serve as a network for cooperation and for the exchange of information throughout the sector within Europe;
- Foster contacts with the mining community throughout Europe and the world and wherever appropriate to achieve our shared objectives.

VISION FOR EUROPEAN MINING COMPANIES

A viable and responsible minerals and metals industry which provides the essential economic, social and environmental assets for society's sustainable development.

EUROMINES STEERING COMMITTEE

- | | |
|--|----------------|
| — Mark Rachovides
Eldorado Gold Corporation | President |
| — Jan Moström
Boliden | Vice president |
| — Göran Bäckblom
LKAB | Member |
| — Thorsten Diercks
Vereinigung Rohstoffe und Bergbau | Member |
| — Thomas Drnek
Fachverband Bergwerke und Stahl | Member |
| — Ingmar Haga
Agnico-Eagle | Member |
| — Henryk Karas
KGHM Polska Miedz | Member |
| — Vasili Nicoletopoulos
Natural Resources GP | Member |
| — Vicente Gutierrez Peinador
Iberpotash, S.A. | Member |

EUROMINES REPRESENTATIVITY

**Euromines Representativity
in Metals Mining**
in % of EU production



**Euromines Representativity
in other Minerals**
in % of EU production



**Euromines Representativity
in Industrial Minerals**
in % of EU production

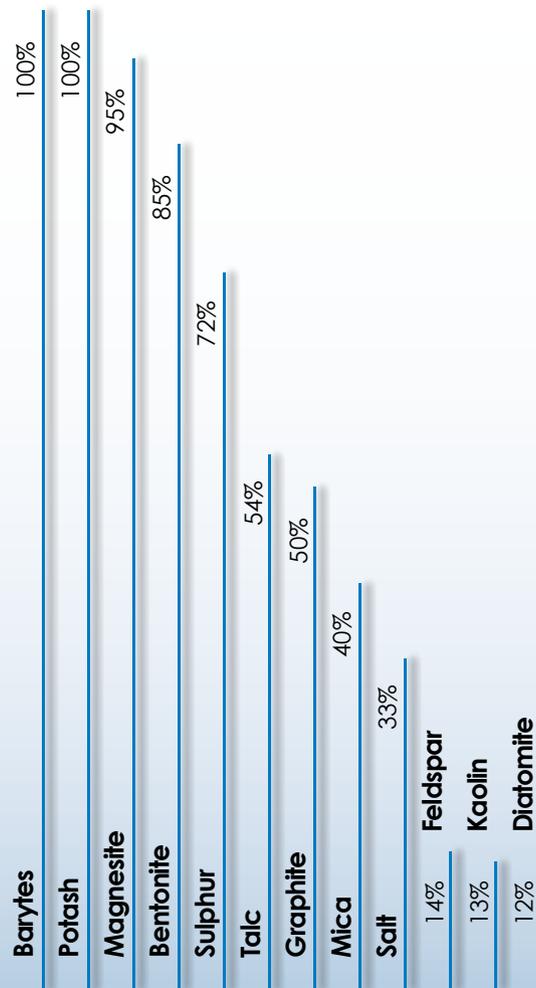
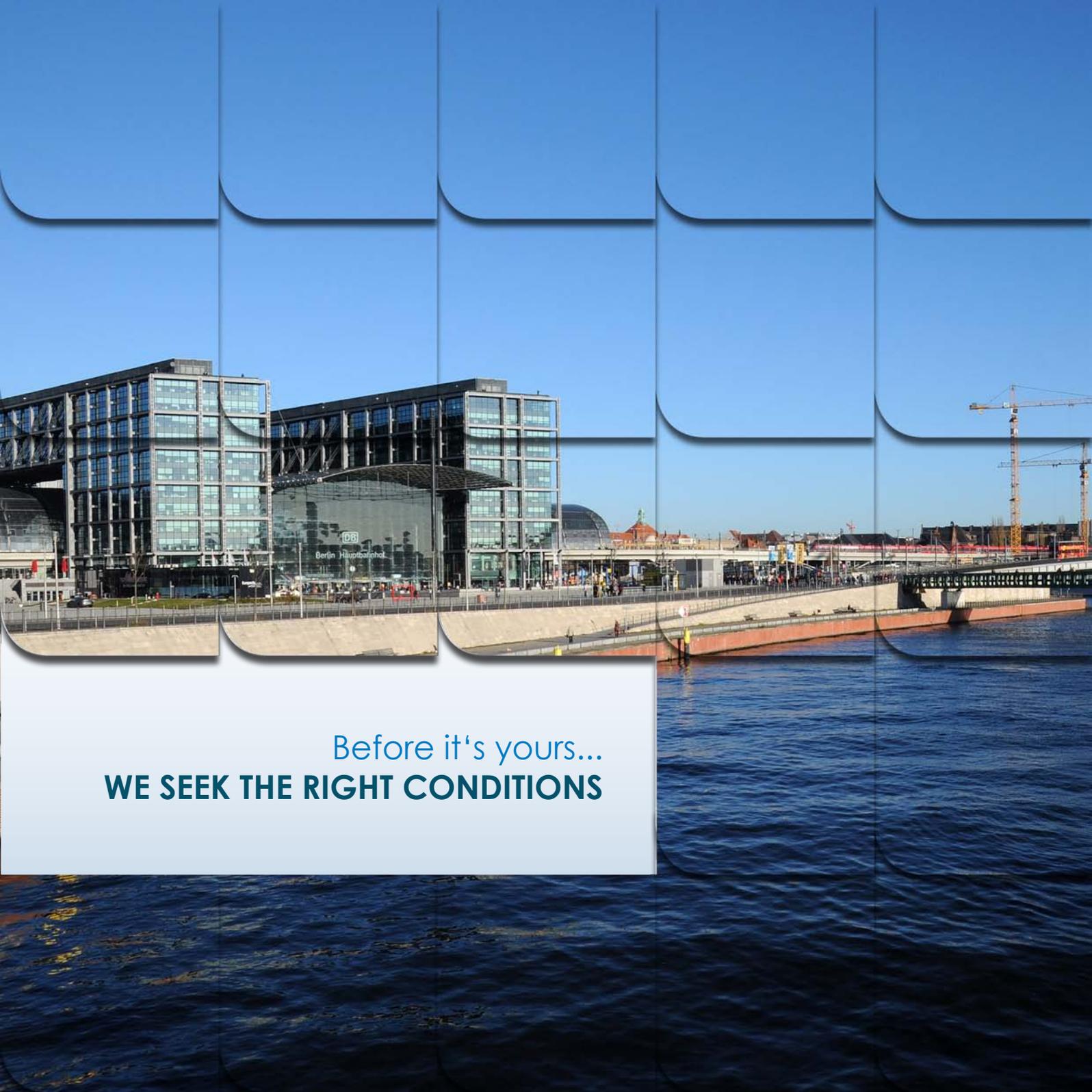




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Before it's yours...
WE SEEK THE RIGHT CONDITIONS

1.1 EUROPE NEEDS AN INDUSTRIAL RENAISSANCE

The minerals and mining industry is a major driver of the economy, occupying a primary position at the start of the resource supply chain. Minerals and mining have brought significant economic opportunities in Europe – such as jobs – particularly in the areas where unemployment levels are high. Euromines members can contribute even more to the European Industrial Renaissance now crucial to Europe's future.

The EU is emerging from its longest-ever recession but the economic recovery and reversing trends in employment cannot happen without industry. EU28 GDP grew by 0.2% in the third quarter of 2013. This is a positive sign for the EU, but the recovery remains modest, with European Commission forecasts of 1.4% GDP growth for the EU28 in 2014 and unemployment rates close to 11% for the next two years.

Today manufacturing industry accounts for over 80% of Europe's exports and 80% of private research and innovation. In total, 1 in 4 private sector jobs are in industry and 1 job created in manufacturing industry generates up to 2 jobs in the services sector. The manufacturing industries are at the core of industrial clusters, and are important elements of the supply chain, thereby contributing to the EU's economy competitiveness. But the industrial basis of Europe has been continuously declining since the 1990s. Industry's share in Europe's GDP is now down to 15.1%. Since 2008, 3.5 million jobs have been lost in manufacturing. However, without primary and secondary raw materials the downstream industries cannot survive and it should not be forgotten that the primary industry in Europe in particular provides jobs in regions where often other employment cannot be found.

“Industry is at the heart of Europe and indispensable for finding solutions to the challenges of our society, today and in the future. Europe needs industry and industry needs Europe. We cannot continue to let our industry leave Europe. Our figures are crystal clear: European industry can deliver growth and can create employment. That is why we have adopted a detailed strategy for the re-industrialisation of Europe.”

European Commission Vice President Antonio Tajani



1.2 SETTING THE RIGHT FRAMEWORK FOR EUROPEAN ECONOMIC GROWTH

For more than seven years Euromines has been an active partner in the preparation, implementation and promotion of the Raw Materials Initiative strategy which sets out targeted measures to secure and improve access to raw materials for the EU. Based on a three-pillar approach, it aims at improving access to raw materials for Europe.

On 24 June 2013, the European Commission adopted a Report on the implementation of the Raw Materials Initiative. The aim of this report is to present the current state of play with respect to the implementation of the Raw Materials Initiative and provide an overview of the ongoing initiatives while highlighting the joint interest for the EU and third countries rich in raw materials to work in partnership.

Raw materials are essential for the sustainable functioning of modern societies. Access to and affordability of mineral raw materials are crucial for the sound functioning of the EU's economy and for its economic growth. With the EU Raw Materials Strategy in place, implementation is key and it is now being driven forward through national initiatives. The strategy aims at exchanging good practice in respect of national minerals and land use planning. So, looking at how it is actually used is important.

The European Commission called on EU Member States to develop national strategies in support of the raw materials industry and fostering access to resources. Good examples are briefly described on our [website](#).



1.3 CRITICAL RAW MATERIALS AT EU-LEVEL

Securing reliable and undistorted access to raw materials is a major and growing concern both within the EU and across the globe. As a consequence, the Raw Materials Initiative was instigated to manage responses to raw materials issues at an EU level. This ongoing process requires constant inputs from the industry and here Euromines represents the voice of the European mining industry.

At the heart of this work is defining critical raw materials at the EU level. These critical raw materials have a high economic importance to the EU combined with a high risk associated with their supply. The first analysis of EU critical raw materials was published in 2010 by the Ad-Hoc Working Group on Defining Critical Raw Materials. Fourteen critical raw materials were identified from a candidate list of forty-one non-energy, non-food materials. The group where Euromines had its representatives highlighted the need to revise this list at regular intervals.

A first revision of the list was carried out throughout 2013. The purpose of the revised study is to support the European Commission in assessing the criticality of selected raw materials. The identification of critical raw materials at EU level is an important action of the EU's raw materials strategy cutting across the value and the supply chain.

The revised study extends the work carried out previously at EU level. Three key areas are addressed:

- Revision of the list of critical materials for the EU.
- Discussion of additional potential influences on raw material criticality.
- Extension of the analysis to biotic materials.

The updated list of Critical Raw Materials is due for publication in June 2014. Even considering the

increase in scope of materials considered in the assessment, the list of Critical Raw Materials has risen to 21, with a few significant additions.



Photo: Boliden

1.4 WEALTH CREATION BY MINERAL EXTRACTION IN EUROPE

A vast array of raw materials, including minerals and metals, play a key role in the development of industrial applications and advanced consumer products. We have become very dependent on highly specialised metals and alloys. Some are relatively rare metals, yet essential in the manufacture of advanced technological products. Hosted by the European Economic and Social Committee (EESC), the mining industry held an event on Wealth Creation by Mineral Extraction in Europe on 3rd December 2013.

Mr. Ingmar Haga, Vice-President Europe of Agnico-Eagle (the company that operates the EU's largest operating gold mine at Kittilä in Finland), gave practical insights regarding the mine, its development and its commitment to sustainable mining in terms of both environmental standards and development opportunities for employees and the community.

Ms. Anna Mäkelä, the mayor of Kittilä, highlighted the positive impacts that the opening of the mine had on regional development through significantly

reducing local unemployment and contributing to population growth but also its successful coexistence with traditional and other activities, such as tourism. She stressed that tourism benefited from mining as, for example, workers use the ski resort facilities year-round.

Mr. Gwenole Cozigou, Director responsible for Resources Based, Manufacturing and Consumer Goods Industries at DG Enterprise and Industry of the European Commission, outlined the most recent EU policy developments regarding raw materials. He emphasized in particular the importance of the European Innovation Partnership on Raw Materials (EIP), the Strategic Implementation Plan (SIP) of which sets the roadmap "to ensure a sustainable supply of raw materials to the European economy to make Europe a world leader in raw materials exploration, extraction, processing, recycling and substitution by 2020." He stressed the importance of the future calls for commitments which represent important milestones towards this objective.



Experts then had the opportunity to develop various but complementary matters linked to raw materials. Mr. Francisco Javier Fernández Cortés, Director of a technological centre focusing on Marble, Stone and Materials, outlined the difficult situation of the natural stone sector in Spain but also presented various projects, some of them co-funded by the EU, aiming at fostering research and development in the field of raw materials. Ms. Hilde Van Laere, Delegate of the European Economic and Social Committee, outlined the importance of responsible and transparent sourcing of raw materials imported from non-EU countries and shared practical solutions to improve sustainability across the value chain. Prof. Vladko Todorov Panayotov, Member of the European Parliament, explained how critical a sustainable supply of raw materials is for Europe, highlighting the insubly complementary nature of mining and recycling to meet a demand which is increasing worldwide with population growth, increased urbanisation and the development of emerging economies.

Prof. Per Nicolai Martens from RWTH Aachen University the Moderator, then outlined the latest progress linked

to environmental standards in mining and the contribution of the academic world to their development before opening the floor for a debate with the public.

Mr. Mark Rachovides, President of Euromines, closed the conference debate by stressing that Europe is resource-rich in terms of mineral deposits, ideas and people and can meet tomorrow's raw materials challenges. Above all, he highlighted that regulatory standards must enable progress and good performance and can make a real difference when it comes to innovation, where Europeans and European companies are world leaders.

On the occasion of the event Euromines launched its new publication "[Sustainable Gold Mining](#)". This publication aims at presenting detailed information regarding gold, its numerous uses as well as the standards applying to gold mining production in Europe. It presents concrete examples of modern-day gold mining operations and their contribution to EU's sustainable growth.



1.5 ESCO: EUROPEAN SKILLS, COMPETENCES AND OCCUPATIONS TAXONOMY

The European Commission is developing a European Skills, Competences and Occupations taxonomy (ESCO), which will describe the most relevant skills, competences and qualifications needed for several thousand occupations in Europe. Euromines contributes to the discussions as an expert on the extractive sector.

Aimed at institutions and stakeholders in the labour market and education sector, this new tool will be progressively developed over the coming years to include as many occupations as possible. Once finalised, ESCO will be the first classification of its kind available in all EU languages.

ESCO will be made available to all institutions in the labour market and within the education sector. The detailed picture of job profiles provided through ESCO has the potential to bring benefits to both jobseekers and employers. For example, it could be used to help jobseekers better describe their skill sets, or to develop new training initiatives adapted to the needs of the labour market and improved career guidance service.



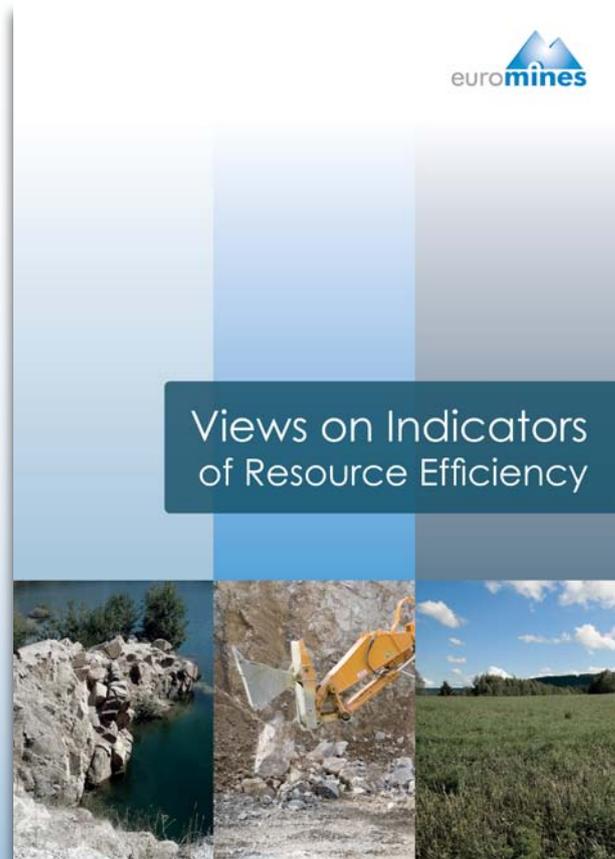
1.6 THE RIGHT MEASURES OF SUCCESS

During 2013, a preliminary set of 20 indicators was discussed with Member States and industry (including Euromines) in the European Commission Raw Materials Supply Group to monitor actions by Member States in relation to National Minerals Policy, Land Use Planning, authorisation and permits. A first round of reporting was completed, the results of which will be presented at the Presidency Conference in Athens in June 2014. This has been significant step that will provide a first insight toward revealing the current state of play and trends, and highlighting some practices worthwhile exchanging amongst Member States. Many (but not all) countries are in the process of establishing national Minerals Policies and reviewing their linkages to other national policies.

The European Innovation Partnership on Raw Materials (EIP) entered its implementation phase during 2013 (see below). The EIP governance structure, with the support of the European Commission, will monitor progress towards the objectives and targets of the EIP. Euromines, in co-operation with its member companies and the ETP-SMR, critically reviewed consultants' proposals for a set of indicators to be reported for that purpose. We were able to draw upon business experience and the stated objectives of the new European Innovation Partnerships and Horizon2020 to recommend to the European Commission that the bulk of the reporting should be bottom-up on an as-needs basis, rather than a response to top-down mandatory requirements. Euromines and the ETP-SMR will contribute to a final selection of suitable indicators during 2014.

How will the new Resource-Efficient EU recognise itself? Euromines members entered this debate in 2011 when we published "[Views on Indicators of Resource Efficiency](#)". Throughout 2013, the European Resource Efficiency Platform (a group hand-picked by Janez Potočnik, European Commissioner for Environment)

worked on the question. Euromines worked behind the scenes to contribute to the important debate, despite its members having been inexplicably excluded from the group's meetings. The group was disappointingly only able to propose indicators that had already been identified as inadequate in the 1990s and Euromines continues to discuss alternative indicators of Resource Efficiency with the highest levels of the Commission. A proposal is expected within a Communication to be adopted in the summer of 2014.



A collage of various application icons on a mobile phone screen, including a camera, social media, games, and utilities. The icons are arranged in a grid pattern with a perspective effect, set against a background of a wooden surface and a red mushroom.

Before it's yours...
**WE ADD VALUE
THROUGH INNOVATION**

2.1 EUROPEAN INNOVATION PARTNERSHIP: BUILDING ON EUROPE'S STRENGTHS

The supply of raw materials, the lifeblood of today's and tomorrow's high-tech industry, is increasingly under pressure. With a view to easier access to raw materials for Europe, the European Commission has proposed to set up a European Innovation Partnership (EIP) on Raw Materials. Euromines members welcome the acknowledgement of the importance of raw materials for the growth and competitiveness of Europe's economy and society.

Innovation is a powerful vehicle in meeting Europe's challenges in raw materials. For example, new technologies help to reduce losses, safely extract minerals deeper underground, source the raw materials in more remote areas and under a wider range of conditions. It has been estimated that the value of unexploited European mineral resources at a depth of 500-1,000 metres is about € 100 billion (source EC). This is also why a European Innovation Partnership on raw materials has been set up by the Commission towards increasing Europe's own production.

The extractive sector has been very supportive of the work conducted so far and welcomes the long term aim of the European Commission to tap the full potential of primary and secondary materials and to boost the collective innovation capacity of the EU raw materials users, regulators and suppliers. It will thus become a strong sustainable pillar of the EU economy with increasing benefits for society. Increases in population and the fight against poverty will continue to drive the growing demand for raw materials in the EU and elsewhere. It is known that between now and 2050 resource efficiency measures such as optimisation of reuse and recycling as well as extended product lifespans will only partly close the material supply deficit. For the foreseeable future there can be no growth without mining.

In the meantime (until 2020), the EIP on Raw Materials will promote both technological and non-technological innovation along the entire value chain of raw materials (i.e. exploration, extraction, processing, refining, re-use, recycling, substitution) involving stakeholders for relevant upstream and downstream sectors.

The Partnership will bring advantages in the longer term. For example, (a) new exemplary cost-effective, environmentally sound and safe technological solutions for securing supply of raw materials, and (b) knowledge and skills in the EU to attract investment by industry bringing new jobs and growth to the EU economy.

The commitment of EU Member States to contribute to the EIP is welcomed wholeheartedly by the extractive sector. It has been an important step that Member States recognized that National Minerals Policies in different countries are not always clear and effective enough and that permitting procedures for mining can be lengthy and sometimes lack transparency. Euromines members are ready and willing to be involved in legislative processes aimed at simplifying and streamlining sustainable access to domestic raw materials. In particular, effort is needed to reduce permitting times and increase the legislative reliability of investments in the extractive sector.



Photo: Agnico-Eagle Mines Limited

2.2 STRATEGIC IMPLEMENTATION PLAN: ACTIVE INVOLVEMENT IN TACKLING THE CHALLENGES

The Strategic Implementation Plan (SIP) of the EIP on Raw Materials was adopted by the High Level Steering Group (HLSG) of the EIP on 25 September 2013 in Brussels. Euromines has been present through its members, staff and association together with the ETP-SMR in the operational groups, the Sherpa group and the HLSG.

The SIP addresses all actions deemed necessary to achieve the objectives and targets of the EIP, including research and development along the value chain, raw materials knowledge, exchange of best practices, revision of selected legislation, licensing steps, standardisation, and policy dialogues.

In order to implement the SIP and be successful, the EIP needs to involve a very large number of partners across both the European Union and the entire raw materials value chain that will contribute to realising the objectives of the EIP through concrete actions.

Actions by EU institutions alone will not be sufficient. Nor will funding come only from the EU budget. This is why the European Commission launched the first of a number of open calls for commitments by stakeholders in the private, public and non-governmental sectors including academia. The first call triggered a number of individual raw materials commitments, where the partners jointly committed to co-operate and take actions that will contribute to achieving the objectives of the SIP, in the different action areas.

Euromines members have already prepared a whole series of proposals for actions aligned to SIP priority areas. One key area where Euromines members would like to contribute in cooperation with the European and national governments is to

ensure a stable and competitive framework for primary raw material supply from EU sources. This will involve working with the European regions to increase awareness of the vital nature of the mining sector.

Improving Europe's waste management framework conditions and performance is another priority area for Euromines members. The Euromines action plan also seeks to contribute to the theme of "Knowledge, skills and raw material flows" as well as promote a pro-active international co-operation strategy as a part of the "International Cooperation" Pillar.

Until March 2014, the European Commission had received 90 commitments as a response to the first call. Approximately 40% of the Commitments were proposed by industry, 60% addressed primary production of raw-materials in the EU and almost all intend to seek some EU funding for implementation.



Photo: LKAB, Fredric Alm

2.3 RAW MATERIALS UNIVERSITY DAY: PROMOTING SKILLS AND EMPLOYMENT

In December 2013 the European Commission launched a communication campaign "Raw Materials University Day" in the framework of the EIP on Raw Materials. The successful implementation of the EIP depends on the ability to communicate on the challenges of the sustainable supply of raw materials. Euromines members are ready to play an active role.

Despite the fact that Europe has many universities with a long tradition and excellent programmes in the raw materials sector, the need for more knowledgeable and skilled professionals is still high.

The European Commission would like to promote skills and employment in raw materials to boost sectoral competitiveness and sustainable growth while show-

ing the huge potential of Europe's raw materials. The aim of the Raw Materials University Day is to attract young people that are choosing what to study or future graduates who we would like to be informed about the study and working opportunities in the raw materials sector.

Euromines members intend to be actively involved in the Raw Materials University Day initiative and participate in the events organised in different EU countries. The European Commission plans a series of events in various Member States, which will take place four times per year between 2014 and 2020. To date, 21 universities from 16 Member States expressed their wish to take part.



2.4 COBALT: 2020 EUROPEAN RESOURCE MANAGEMENT

In November 2013 the Commission funded project “COBALT” started by its two day conference “Industry and Society’s needs for sustainable management of raw materials in Europe: Exploring solutions for future action”. Euromines welcomes and supports this project since the European mining industry is one of the most important and sustainable suppliers and an important stakeholder in this process.

The Europe 2020 Strategy, the Resource Efficiency Flagship as well as the Raw Materials Initiative all seek to provide new solutions to some of the most pressing economic challenges Europe is currently facing: satisfying an increasing demand for raw materials by identifying and using sustainable innovative approaches, easing the EU's high dependency on imports of raw materials, price volatility as well as trying to find new ways of minimising the impact of market distortions.

Europe has great resource potential and the planned or ongoing mining projects represent an important pillar for Europe's economic and industrial redevelopment along the whole value chain.

In this context, it is Euromines' strong belief that the EU-funded FP7 project COBALT, provides for a joined debate aimed at bringing together the management of sustainable raw materials across the whole value chain into the public arena. This supports simultaneously, the main objectives of the EIP on Raw Materials by acknowledging the importance of the extractive industry as a crucial stakeholder contributing to the security of raw materials supply.



2.5 HORIZON 2020: COUPLING RESEARCH AND INNOVATION

Horizon 2020 is the biggest EU Research and Innovation programme ever with nearly €80 billion of funding available over 7 years (2014 to 2020) – in addition to the further private investment that this money will attract. It promises more breakthroughs, discoveries and world-firsts by taking great ideas from the laboratory to the market. Euromines supports the Horizon 2020 proposal which explicitly mentions Raw Materials as one of its priorities.

Horizon 2020 will be the financial instrument implementing the Innovation Union, a Europe 2020 flagship initiative aimed at securing Europe's global competitiveness.

Seen as a means to drive economic growth and create jobs, Horizon 2020 has the political backing of Europe's leaders and the Members of the European Parliament. They agreed that research is an investment in our future and so put it at the heart of the EU's blueprint for smart, sustainable and inclusive growth and jobs.

By coupling research and innovation, Horizon 2020 is helping to achieve this with its emphasis on excellent science, industrial leadership and tackling societal challenges. The goal is to ensure Europe produces world-class science, removes barriers to innovation and makes it easier for the public and private sectors to work together in delivering innovation.

Horizon 2020 is open to everyone, with a simple structure that reduces red tape and time so participants can focus on what is really important. This approach makes sure new projects get off the ground quickly – and achieve results faster.

The EU Framework Programme for Research and Innovation will be complemented by further measures to complete and further develop the European Research Area. These measures will aim at breaking down barriers to create a genuine single market for knowledge, research and innovation.



2.6 SUSTAMINING PROJECT: INVISIBLE, ZERO-IMPACT MINE/QUARRY

The [Sustaining project](#) marks the start of a series of development activities aiming to realize the concept of an invisible, zero-impact mine/quarry. Euramines is one of the project partners.

The natural stone extractive sector, still seen as being old-fashioned and highly environment polluting, will join forces to correct this image showing that natural stone extraction can be approached with a cutting edge methodology with low impact underground and zero impact above ground.

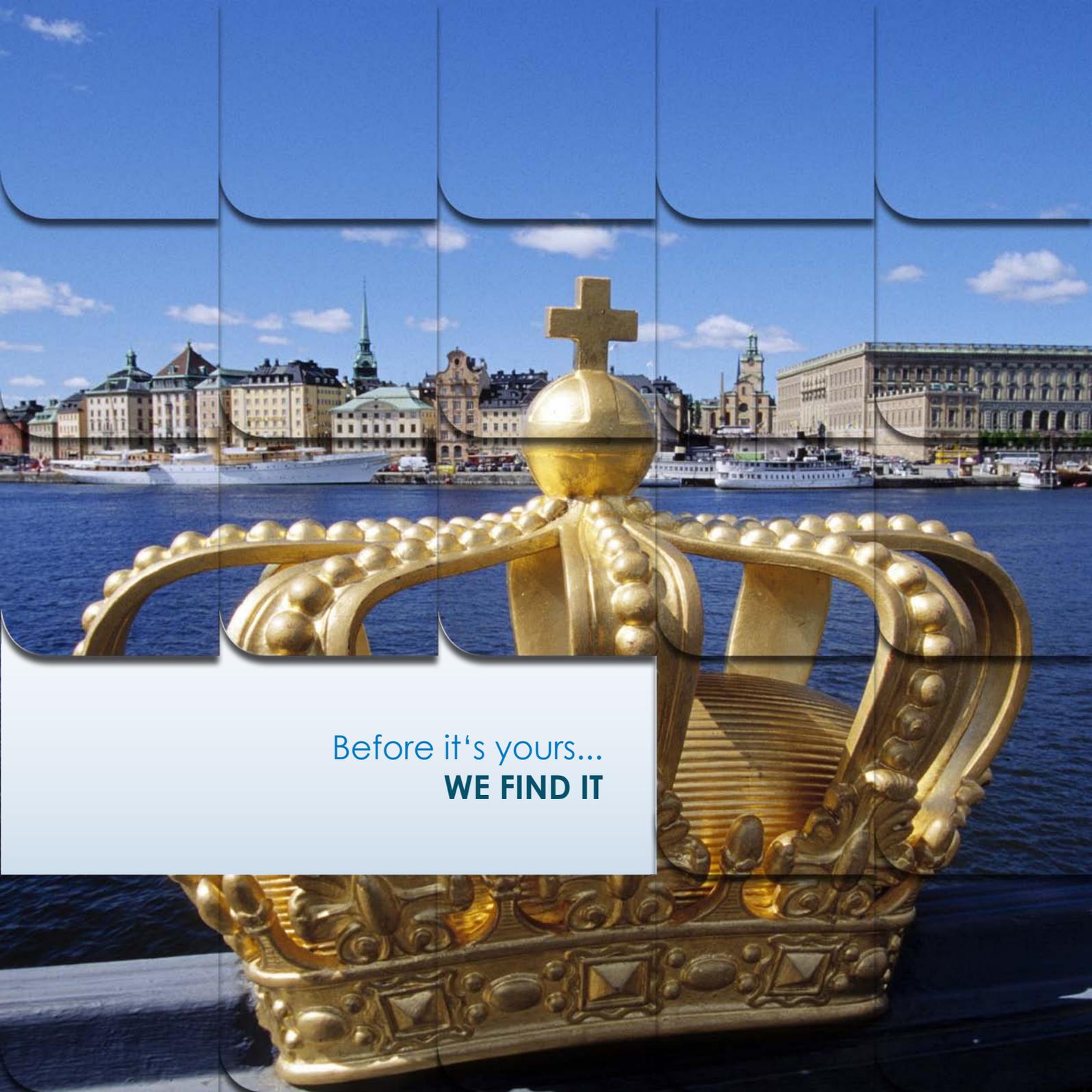
Faced with this problem, the project aims to develop technological support for the sector covering both research centres with expertise in natural stone, business associations and SMEs.

The objectives that the SUSTAMINING Project addresses are:

- Development of a new methodology for selective exploitation according to demand, taking into account the quality requirements of the product on site.
- Application of this methodology in the design and exploitation of new quarries, transforming the raw material and quality control by using non-destructive geophysical methods.
- Definition of the methodology in order to reduce waste production and minimize sterilization of reserves.
- Development of geo-statistical methods for estimation of natural stone reserves.

The total project budget is more than €2,5 million out of which €1,5 million project funding by the European Commission as a part of EU Seventh Framework Programme.





Before it's yours...
WE FIND IT

3.1 THE EUROPEAN TECHNOLOGY PLATFORM ON SUSTAINABLE MINERAL RESOURCES

The sector's own [European Technology Platform \(ETP SMR\)](#) formalised its legal existence in 2013 and is now an established “association internationale sans but lucrative” (aisbl) under Belgian law.

ETP SMR organised a first brokering event in December 2013 and its current President Dr. Corina Hebestreit was also appointed member of the Industrial

Advisory Group for Horizon 2020. The ETP SMR is represented on the EIPs High Level Group and whilst driving the joined research agenda forward and providing insight to the debates, is also trying to encourage deployment of the innovative potential of the sector.



Photo: Boliden

3.2 HORIZON 2020, PROMINE, AND ERAMIN (NETWORK OF NATIONAL RESEARCH FUNDING ORGANISATIONS ON RAW MATERIAL RESEARCH)

Under the Commission's research funding programme Horizon 2020 One of the big flagship projects of the extractive industry – [ProMine](#) – won one of the prestigious EU prizes for best project and was awarded this in 2014 in Athens.

Still ongoing projects such as [I2MINE](#), [EURARE](#), [EUROGEOSOURCE](#), [IMPACTMIN](#) and [MINERALS4EU](#)

will yield more results and will enhance the EU's competence in mineral raw materials.

ERAMIN launched its first joined call between two Member States in 2013 making national RTD funding available and completing the research funded by the Commission.

3.3 EUROPEAN MINERAL POTENTIAL PRESENTED AT PDAC 2013

Encouraged by the EU's newly launched EIP on Raw Materials and the intensified activities of European geological surveys and academic institutions, the interest in European mineral deposits is increasing. Euromines promoted European mineral potential in March 2013 at the Prospectors and Developers Association of Canada's global annual event.

At a two-day course, organized by a new pan-European research and industry collaborative body, European Ore Deposit Initiative (EODI), an overview of the metal endowment of the "Old World" of Europe was given. Held on 1st and 2nd March 2013 under the chairmanship of Prof. Herrington, Natural History Museum of London, over 60 geologists and exploration managers discussed a range of European mineral deposits and their future mining potential.

The course provided a review of all the major mineral belts: Fennoscandia (including Greenland), Iberia, Central European base and precious metal belts, the Carpatho-Balkans through to Turkey and the Caucasus, and the Urals at Europe's eastern boundary. Presentations were made by leading specialists including experts from local geological surveys.

Another part of the workshop highlighted recent European Union initiatives and active research projects focused on the development of mineral exploration and mining in Europe. Euromines presented its activities and the expectations it has for the EIP on Raw Materials fostering research and innovation in the sector and improving legal frameworks.

Exploration in Europe deserves stronger support since it is both crucial to future regional economic development and is the stepping stone to the future raw materials supply for Europe.

Key issues to now attract risk capital are

- Free availability of pre-competitive geological data,
- Access to land,
- Public and political support.



3.4 INVESTMENT IN EUROPE FINALLY UP!

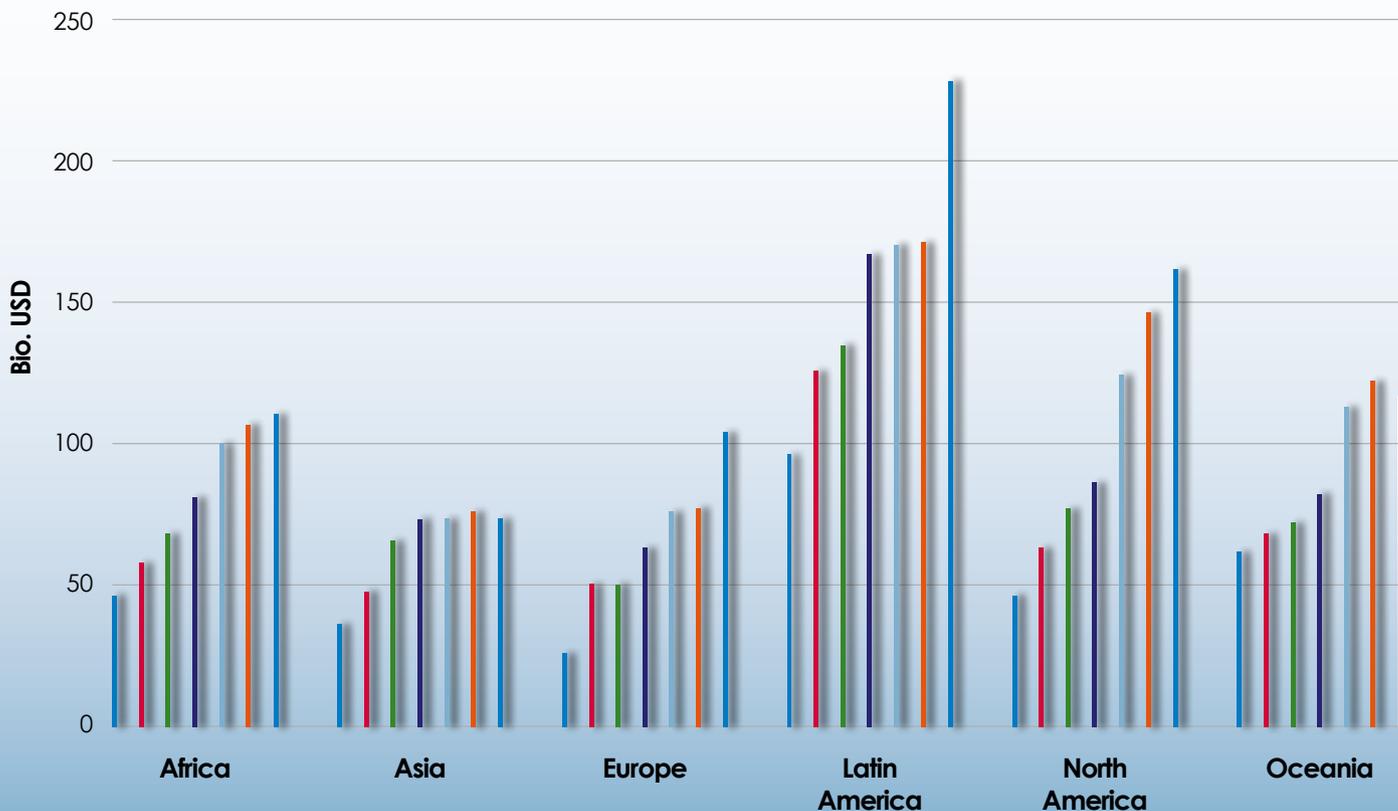
Exploration in Europe is only today starting to reap the benefit of increased investment and improved technology deployed in recent years. Europe is not “mined out”. Instead, the mining industry consistently adds more to proven reserves than it takes away. In 2013 the investments in the pipeline increased significantly as illustrated in the table.

However total corporate exploration expenditure in Europe during 2013 was 450 MUSD* or 3.1% of world total. This was down by 36% compared to 2012, when Europe’s share of global expenditure was 3.4%. It is worrying that the expenditure compared to total global exploration dropped in 2013 indicating a dete-

riorating competitive climate in Europe in spite of high level political interest in the mining sector from both national governments and the EU.

Roughly half the funds were spent on base metal exploration, 30% on gold and the remainder on all other metals. The Nordic countries, Greenland, Norway, Sweden and Finland, are the most favoured accounting for some 40% of the total in both 2012 and 2013.

* All European countries excluding Belarus, the Ukraine, Moldova, Georgia, Armenia, Russia. Turkey is not included. Only metal exploration is included.
Source: Raw Materials Group/SNL Metals & Mining





Before it's yours...
WE SAFEGUARD THE ENVIRONMENT



4.1 EUROMINES PRESIDENT PRESENTS NEW APPROACHES IN REGULATING MINE CLOSURE AT CONFERENCE IN CORNWALL

Euromines President Mr. Mark Rachovides gave one of the keynote speeches at Mine Closure 2013, a global meeting on responsible mine closure. The conference took place at the Eden Project, itself a former mine within the world heritage mining landscape of Cornwall. The conference was focusing on mine closure and its socio-economic and environmental legacies.

Mr. Rachovides presented new approaches to regulating mine closure and addressed regulatory issues in closure planning and asset retirement in Europe. He stressed that Euromines members promote best practice and integrate the management of environmental impacts across all phases of mine-life from exploration to mine closure by preparing guidance for industry and contributing to EU Guidance on a variety of topics, including mine waste management.

"A common assumption is that mining is always incompatible with other land uses, particularly conservation or natural land uses. Some types of mining allow for 'restoration' of land to pre-extraction status, others can alter the landscape permanently but instead allow for new land uses. Some types of mineral extraction can also co-exist with other land uses simultaneously" said Mr. Rachovides who added that "modern mining techniques and technology allow for far better management of social and environmental impacts than in the past. Today we have growing opportunities for compatibility with other uses. So as an industry it is incumbent on us to foster a broader understanding of mining in land use planning."

In his presentation Mr. Rachovides also introduced a new initiative of the European Commission the

European Innovation Partnership on Raw Materials ("EIP") where special attention will be given to promoting the full and proper implementation of existing legislation to increasing the exchange of best practices related to the implementation of Environmental and Minerals Policies in Member States, particularly in land use, mining waste, and the sustainable management of resources.

"New EU policy initiatives deserve our participation and support. We must be part of shaping their outcomes. Innovation, research and resource efficiency are themes at the core of what we do. We are long-term investors, creating jobs and skills and paying taxes, often in the regions of Europe that need them most" highlighted Mr. Rachovides in his presentation.





4.2 WORKING FOR A SMARTER LEGISLATION: THE REVISION OF THE EIA DIRECTIVE

The Environmental Impact Assessment (EIA) Directive is an extremely important piece of legislation. Each significant industrial project has to undergo such an assessment aiming at measuring and ultimately lowering its effects on the environment prior to its permitting; mining projects included.

The current EU legislative framework dates back to a directive adopted in 1985, which has been amended by subsequent instruments. The European Commission decided to move on and published a consolidated version of the Directive 2011/92/EU in December 2011, to facilitate completion of the revision initiated in 2010 through a public consultation.

The proposal for a revised EIA Directive was published end of October 2012. One of its objectives was to align the EIA regime with both new EU environmental policies and the principles of “smart regulation”. Euromines very much welcomed the

stated objective of contributing to a simpler and more consistent EIA framework. This opinion, unanimously shared by EIA experts across the entire spectrum of industrial activities, inspired Euromines' continued advocacy for a better revised EIA regulatory framework throughout 2013. With the full support of its Members and in coordination with a number of other stakeholders, Euromines called for a clear, consistent and predictable EIA regime meeting high environmental standards.

The compromise agreement reached by the European Parliament, the Council and the European Commission on 18 December 2013 and officially adopted on 16 April 2014, overcomes a number of shortcomings identified in the initial proposal. Though the revised EIA regime will be more demanding than the existing one, overall the revision lead to a more balanced text than what was initially proposed.



4.3 ACCESS TO LAND - NO NET LOSS INITIATIVE

As part of its Roadmap on Resource Efficiency, the European Commission committed to come forward with an initiative in 2015 to achieve “No Net Loss of Ecosystems and their Services”. In 2012 it invited Euromines to take part in an ad-hoc working group to collect the views of Member State representatives, stakeholders and experts on the way forward. A final set of documents was adopted during the last working group meeting on 5th July 2013.

2013 also saw the European Commission adopt its Communication on Green Infrastructure, to which Euromines contributed through submissions to stakeholder consultations. Green Infrastructure has been described as a network of natural and semi-natural areas which perform a wide range of ecosystem services such as water retention and carbon sequestration. The current focus is on collection of sufficient spatial data to map existing ecosystem services and facilitate green infrastructure development. The European Commission is expected to follow up with a proposal to develop EU-level green infrastructure projects in 2014-15.

Euromines also contributed to the International Council on Mining & Metals (ICMM) commissioning [an independent overview of the current issues regarding biodiversity offsets](#), which was published jointly with the International Union for the Conservation of Nature

(IUCN) in July 2013. Euromines submitted the published report to the European Commission to support its own considerations of the role of offsets in achieving No Net Loss.

January 2013 marked the beginning of the one-year trial period of a “Cross Sector Biodiversity

Initiative” created by ICMM, IPIECA (the global oil and gas industry association for environmental and social issues) and the Equator Principles Association to develop and share good practices and practical tools to apply the International Finance Corporation’s Performance Standard 6 on Biodiversity Conservation. Euromines is a founding member and is participating in the development of practical tools and good practices for managing potential project-related impacts on biodiversity and ecosystem services by application of the mitigation hierarchy (avoid, minimise, restore and offset).

The combination of Green Infrastructure projects and EU No Net Loss legislation has potential to reveal further opportunities that exist for mining projects to cost-effectively contribute to biodiversity conservation objectives within the EU. Euromines and its members will continue to contribute to the EU Biodiversity Strategy and propose workable alternatives to placing further tracts of land effectively off limits to mining.



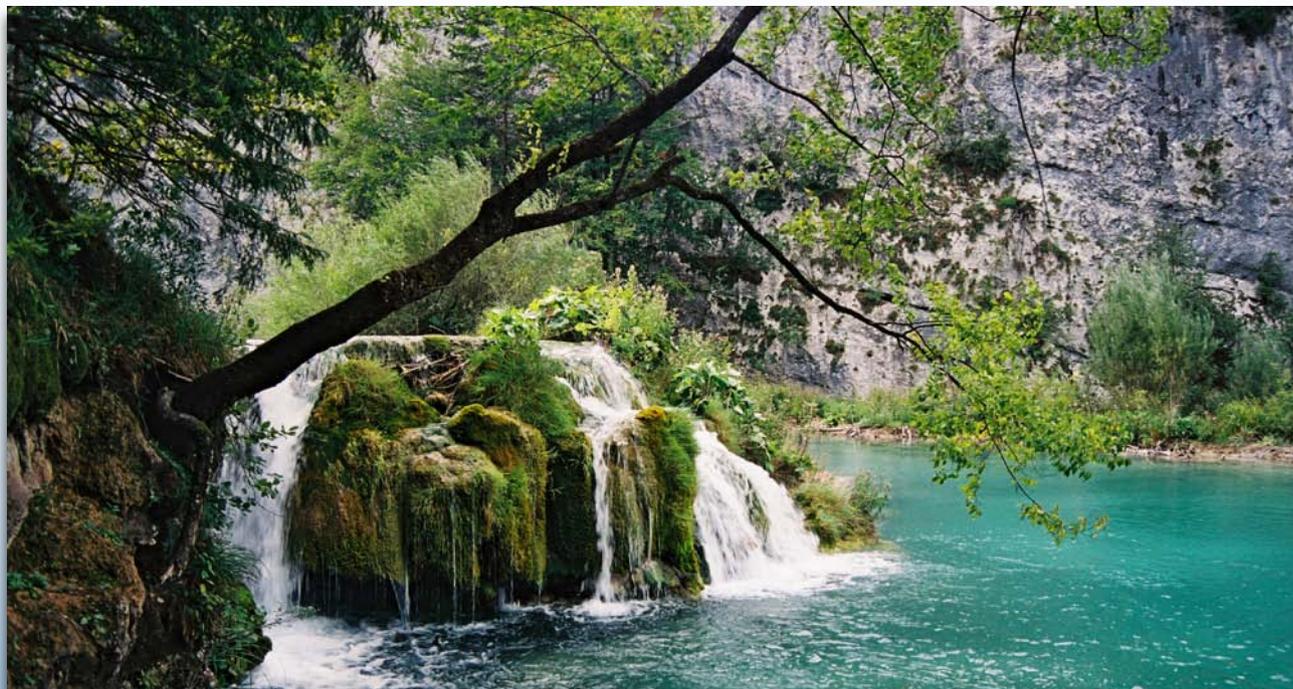
4.4 CONTRIBUTING TO AN APPROPRIATE STAKEHOLDERS' REPRESENTATION: THE NEW WATER PRIORITY SUBSTANCES DIRECTIVE

The adoption of the water priority substances directive was formally completed on 12 August 2013 with the publication, in the Official Journal of the European Union, of directive 2013/39/EU amending Directives 2000/60/EC and 2008/105/EC as regards priority substances in the field of water policy.

The publication of this new directive closed a revision process initiated with the publication of the Commission's proposal that began in 2012. The new directive added 12 new priority substances to the existing list and updated the environmental quality standards (EQS) of certain substances already listed such as lead or nickel. The most relevant innovation in the revised directive is creation of a new mecha-

nism – called the “Watch List” – aiming at supporting future prioritisation exercises by collecting high quality data on substances which could pose an EU-wide risk to the water environment.

Euromines supported such a mechanism and paid specific attention to the presence in the directive of provisions ensuring a scientific selection of substances ‘to be watched’ and an effective participation of the relevant stakeholders in that process through inter alia the existing mechanisms set up by the European Commission. The Directive now meets those expectations and the work leading to the next prioritisation exercise has already begun.



4.5 CHEMICALS MANAGEMENT

The International Maritime Organization (IMO) continued to work through updates to its shipping codes so that regulatory authorities around the globe will require much clearer information about many of the cargoes that our industry transports. Amendments to the International Convention for the Prevention of Pollution from Ships (MARPOL) include new criteria to determine which cargoes are regarded as chemically harmful, both environmentally and to human health.

During 2013, the work led to the drafting of preliminary lists of solid bulk cargoes classified as harmful to the marine environment (HME), with a view to addressing the difficulties experienced by ship owners and operators in obtaining HME declarations. However the final

lists are developed and applied, it will be important that they do not contradict the classifications notified to the European Chemicals Agency in 2010. The Euromines Environment Committee and National Federations supported the ICMM in trying to ensure that metal specificities are properly addressed in the final lists at the IMO.

The draft text of a new United Nations Convention on Mercury was completed in January 2013 and adopted at a Diplomatic Conference in Minimata, Japan, on 9-11 October 2013. The Parties adopted Resolutions for co-operative work on technical guidance to the Convention, the work of which has already begun. Euromines National Federations will directly support the ICMM in contributing to the guidance.



4.6 LIFE CYCLE ASSESSMENT AND PRODUCT ENVIRONMENT FOOTPRINT --> AS A MEASURE OF PERFORMANCE/PROGRESS

In order to improve the availability of clear, reliable and comparable information on the environmental performance of products and organizations, [The EU Single Market for Green Products](#) initiative proposes to establish two methods to measure environmental performance throughout the lifecycle; the [Product Environmental Footprint](#) (PEF) and the [Organization Environmental Footprint](#) (OEF). For this reason, through [a Commission Recommendation](#), a three-year testing period was established to develop product and sector specific rules through a multi-stakeholder process.

In the autumn of 2013, Euromines joined a successful bid to the European Commission to pilot the setting of Category Rules for the assessment of the Product Environmental Footprint (PEF) of a “metal sheet”, which will run for three years (2014-2016). The Product Environmental Footprint Category Rules – PEFCRs, resulting from the PEF pilot phase will become the product rules valid under the PEF, to be used by all stakeholders who decide to measure the performance of their products based on PEF.

There is a significant lack of agreement around what is the right method to use to measure depletion of natural resources (referred to as “Resource Scarcity” in the Life Cycle Assessment Handbooks) and consequential impacts on the future possibility to use those resources. The project will respond directly to such questions and the proposals currently made in the PEF Guidance from the point of view of the metals & minerals supply industry. Some of those views are already published in Euromines’ [“Views on Indicators of Resource Efficiency”](#), which the Euromines Policy Committee developed in 2011.



Photo: Boliden



Before it's yours...
ENERGY IS APPLIED TO DELIVER IT

5.1 ACCESS TO COMPETITIVELY PRICED ENERGY

Manufacturing industry needs access to competitively priced energy. An EC report (22 Jan. 2014) confirms that electricity costs are two to three times higher in the EU than in the US, with a 70% increase since 2000 for EU industry (stable in the US). Regulatory costs (subsidies for renewables, taxes, grid costs, etc.) are the main reasons for this widening gap.

- Natural gas prices are three times higher in the EU than in the US.
- Energy intensive industry is a price taker and cannot pass on additional costs to its mainly global customers.
- Restoring global energy cost competitiveness is a priority. Solutions exist but must address all energy cost components and require a strong political support.
- The transition to a low-carbon economy must be driven in a cost- and time adjusted manner.

Enabling the EU manufacturing industry to grow will automatically reduce global greenhouse gas emissions since the EU industry is far advanced in energy efficiency comparison to many of its worldwide counterparts. Energy intensive industries are key contributors to greening the economy, but these industries are also confronted with a structural imbalance of climate and energy costs in comparison with their global competitors. Due to the laws of thermodynamics, reductions in energy inputs will slow down and further improvement will increasingly require economies of scale and access to low-emission energy sources. This will require growth to not only stimulate innovation in technologies and products but consolidate EU's leadership in the reduction of carbon emissions. Sufficient CO₂ allowances must be available for growth and new investments, including for indirect electricity emissions.

After all, growth of efficient industrial production must be welcomed within the EU. Euromines issued a position paper on the need to assess shale gas and oil extraction in a scientific and unbiased way. The organisation has further stressed vis-à-vis the Commission that as long as there is no energy available at competitive prices the energy-intensive parts of the extractive industry need alleviation through exemption from CO₂ licence auctioning.



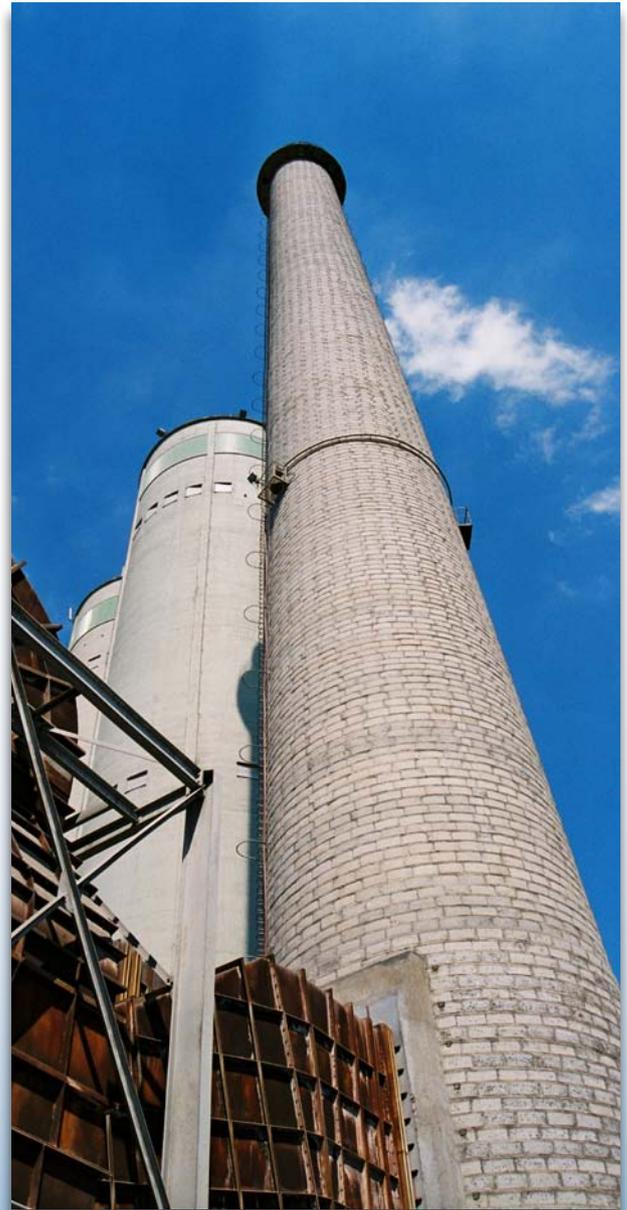
Photo: RHI AG

5.2 ETS – BACKLOADING

In July 2012, the European Commission issued a proposal to postpone the auctioning of an as yet undefined number of CO₂ Allowances towards the end of the third trading period. The purpose was to ensure the 'orderly' functioning of the EU ETS.

The EU is intent on maintaining the 2020 target formula agreed upon under the third Climate and Energy package and most industry sectors wish not to revise it unilaterally unless the carbon leakage issue is solved by an international climate agreement. Any interference within the agreed policy framework will simply increase the costs for industry. By hampering predictability and by increasing regulatory risk of further intervention, it will also deter investments at a time when the EU economy is still on its way out of the crisis.

The new proposal for the European Emission trading scheme post 2013 will be another constraint on the competitiveness of the European industry by imposing further costs on the enterprises which competing producers worldwide do not have to reckon with. It is therefore crucial that energy-intensive industries which face fierce competition are given special allowances in this new scheme.



5.3 ETS – REVISION OF THE CARBON LEAKAGE LIST

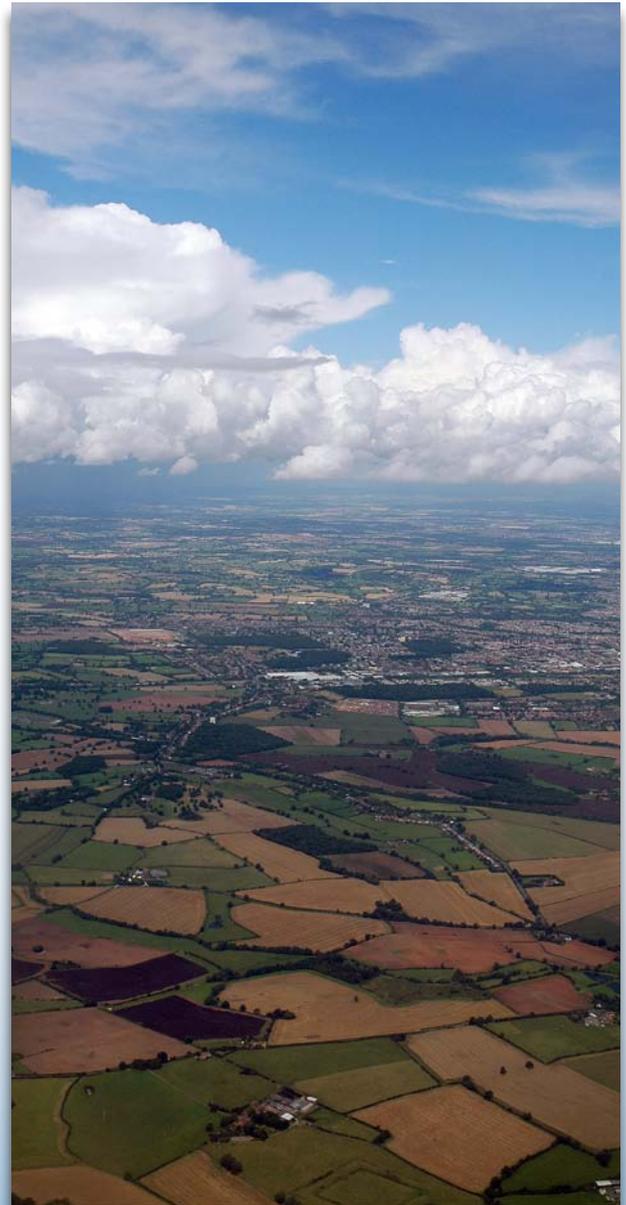
Under the ETS Directive in 2013 the Commission embarked on the revision of the Carbon Leakage List to be finalised in 2014.

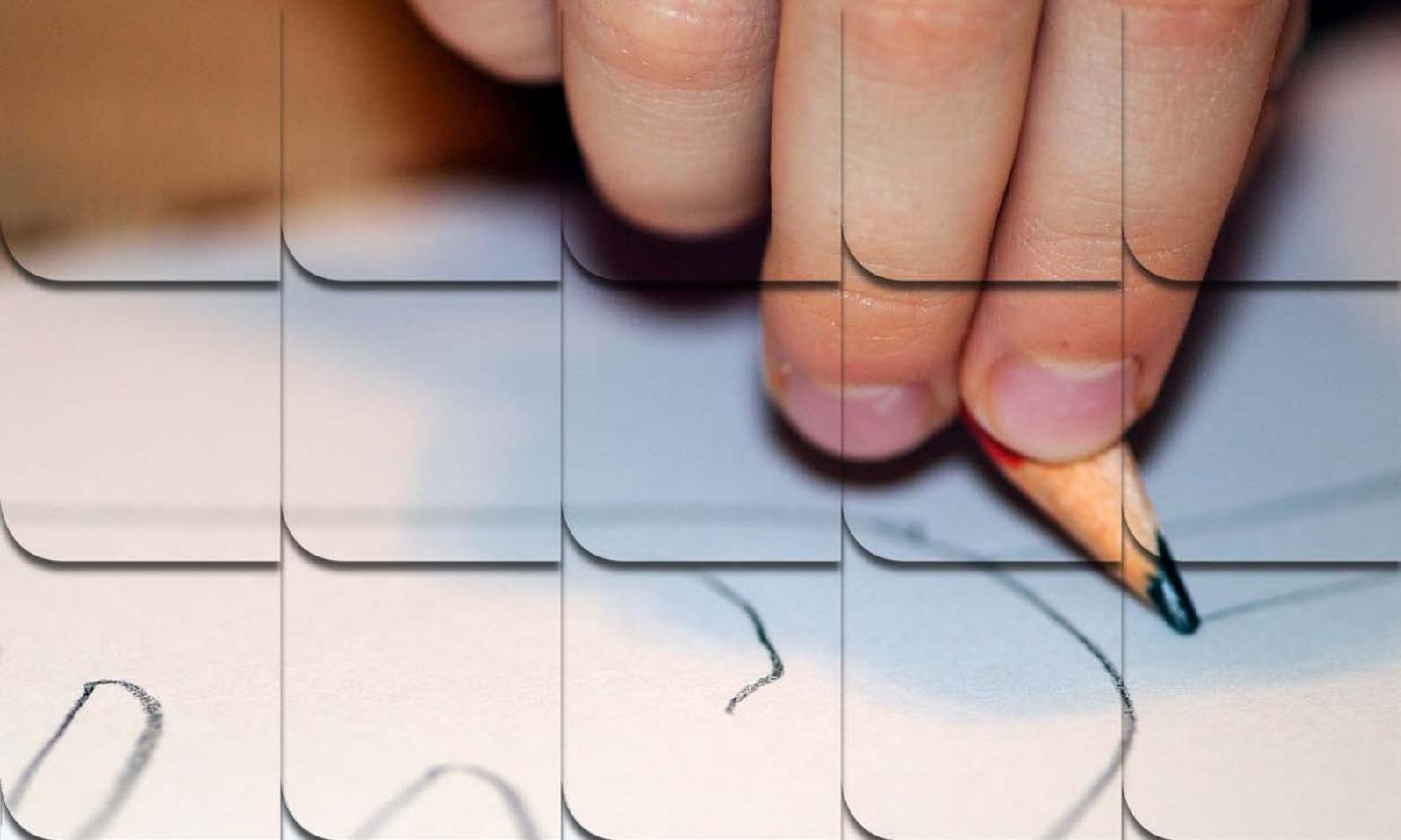
In this context the Commission had appointed the consultant Ecofys to assess the short-comings of the methodology used so far and to make recommendations for the next phase. This report is concluded, but not publicly available yet.

For those members of Euromines that obtained the status on ETS Regulation's Carbon Leakage List which grants companies free CO₂ allowances, it will have to be evaluated whether applying the new methodology and new trade statistics as well as energy consumption statistics from the years 2010 onwards will yield the same results. Otherwise there may be a risk that these subsectors will lose their status on the Carbon Leakage List.

The Commission was expected to publish its preliminary revised Carbon Leakage List by the beginning of May 2014. The criteria for being eligible for that list is not expected to have changed. Following the publication there will be a 6-8 week consultation period. The final adoption of the List is expected for end of the year 2014.

In the meantime the Commission is also providing guidance for the inclusion of certain sectors into the Annexes of the EU subsidy regulation which would allow sectors to receive compensation for increased electricity prices due to the ETS Directive and increased energy prices. This guidance is also expected to be adopted in the 2nd quarter of 2014.





Before it's yours...
**WE SET THE HIGHEST STANDARDS
IN HEALTH AND SAFETY**

6.1 BUT WE NEED TO DO MORE – SAFER BY DESIGN

Hosted by the European Economic and Social Committee (EESC) the European Minerals Foundation Forum together with a whole range of extractive industry associations held an event on “Working together for accident prevention” on 27th November 2013. Euromines was represented by Mr Simon Hunter, Chairman of the Euromines Health and Safety Committee and member of the Standing Working Party Extractive Industry (SWPEI).

Mr Armino Silva, Director, Employment and Social Legislation, and Social Dialogue, gave the opening speech and reminded the participants of the fact that the extractive industry in Europe - like agriculture - is one of the strategic industries in Europe. He recalled that there were many thousand sites across Europe supplying vital resources to the downstream industry and the overall economy and that the extractive sector provides 300,000 jobs across the Union. He recalled that employment and safety go hand in hand and welcomed this particular initiative of two industrial sectors to create new safety standards.

Policy issues such as eliminating illegal extraction and imports of sub-standard machinery, as well as permitting standards and technical machinery standards were being discussed.

The importance of standardisation was highlighted by several participants. Standardisation can assist to raise safety standards, but rather than locking in existing technologies, EU competitiveness is achieved by developing new ones.

The extractive industry and machinery producers agreed on closer cooperation in achieving higher, but cost-effective technical solutions and increased safety standards when it comes to the interface be-

tween machines and people. Both sectors felt that in the context of the EU's Innovation Partnership on Raw Materials and the Horizon 2020 opportunities will arise to develop cooperation programmes such as the UK's “Safer by Design” model and to enlarge it to European scale.

Euromines has signed up as a partner for such a project with a number of national experts as one of its commitments under the EIP on Raw Materials.



6.2 RESPIRABLE CRYSTALLINE SILICA (RCS)

The Commission confirmed that the ACSHH (Advisory Committee for Safety, Hygiene and Health Protection at Work) did not come to a common position for respirable crystalline silica (RCS) and the legislative route for setting a RCS Occupational Exposure Limit remains open. At its last meeting, on 5 December 2012 the ACSHH adopted the chapter on RCS from the opinion of the Chemical Working Party which basically mentions that:

- there is a common agreement for the need of a European OEL at a level of 0.1 mg/m³;
- the employers position themselves in favour of regulation by the Chemical Agents Directive (CAD);
- the Government representatives do not have a single position.
- The employees ask for regulation by the Carcinogens Directive (CMD).

It is worthwhile noting that the work of the CWP and ACSHH on the revision of the Carcinogens Directive is not finalised. A series of substances (including reprotox substances, i.e. toxic to reproduction) must still be discussed and assessed during spring 2014.

In 2013 the Commission began an impact assessment study for the revision of the Carcinogens Directive. The NEPSI partners submitted an additional socio-economic analysis.

For the case of crystalline silica, the Commission could envisage comparing the impact/consequences of the two possible regulatory routes (CMD and CAD). The draft impact assessment study was not finalised by end of 2013. However, a separate process (REFIT), which is reviewing all EU health and safety legislation at the moment, has now stalled the whole process and major delays are expected.

In the case of Respirable Crystalline Silica (RCS) the Commission has withdrawn the funding for the Social Dialogue Agreement - not for political reasons, but for cost-cutting reasons. However, the employers fear that due to the lack of financial support, also the acceptance of the agreement will dwindle. Euromines continues to support the Social Dialogue Agreement. The inclusion of RCS into the Carcinogen's Directive will be re-discussed in 2015.



6.3 REVISION OF THE CARCINOGEN'S DIRECTIVE (CMD)

The revision of the Carcinogen's Directive (CMD) has proven to be a lengthy exercise which is very much dominated by a very strict policy of the European workers unions. More and more substances that are now being reconfirmed or newly confirmed in their classification (also under REACH) are taken up by the Commission's Advisory Committee and their Scientific Committee and are being proposed for inclusion into the CMD and the Chemical Agents Directive. Due to the REFIT exercise, a European review of all health and safety legislation, all discussions are delayed, probably until 2015, thus delaying also all discussions on OELs for respirable silica, diesel exhaust, and NO₂.

Occupational Exposure Limit for NO₂

In June 2013 the SCOEL published its final opinion for consultation. Following detailed discussion also with outside experts for the first time the SCOEL has accepted the scientific evidence of epidemiological studies and concluded to set the **OEL (8-hour TWA) for NO₂ at 0.5 ppm and a STEL (15 min) of 1.0 ppm**. Euromines provides scientific input into the debate and new discussions are expected for 2014.

Occupational Exposure Limit for Diesel exhaust

Following the classification of a carcinogen by WHO the Commission has proposed to set an OEL of 100 µg/m³, which is even with the most modern fleet of machinery not manageable for underground mines. The Advisory Committee has concluded its opinion unfortunately not taking into account the position of the industry formulated in a joint position between Euromines and IMA-Europe.

The SCOEL opinion on the two OELs (OEL for NO₂, OEL for Diesel exhaust) was issued in the last quarter of 2013 and both the Euromines H & S Committee and the European Social Dialogue Committee developed a position on the SCOEL recommendations. Both positions have been submitted to the European Commission and the SCOEL. As next steps it is expected that the SCOEL and the Commission will take position and that then the industry might have to put forward socio-economic arguments in order to prevent the low OELs. Again the REFIT exercise has brought everything to a halt.



Photo: KGHM



Before it's yours...
WE TALK ABOUT IT

7.1 EUROMINES RAW MATERIALS CAMPAIGN WWW.EUMINING.ORG

At the end of 2013 Euromines finalised preparation of its new Euromines Raw Materials Campaign. The www.eumining.org website was officially launched in February 2014. The website is composed of photographs which represent the products, objects and architecture that are symbolic of different European countries. We are highlighting the fact that it is mining that provides us with valuable resources which are used for many essential consumer goods, communication networks, housing, infrastructure etc. that we rely on daily - sometimes for centuries. This is done in a visual way accompanied by the slogan: "Before it's yours, we mine it". The slogan is translated to a number of European languages.

At this stage of the campaign each European country is represented by one photograph that represents either a typical product or object of the country, a famous monument and/or architecture. (We plan to enlarge the number of pictures per country in the second stage of the campaign.) The re-launch of the campaign (second phase) is planned for September 2014. In the second stage of the campaign we plan to add a sentence "Did you know?" including interesting information about the product/object in the photo. This sentence should also be translated to all available languages.

Aggregates
Aluminium

Asbestos
Bauxite

Beryllium

Bismuth

Boron

Bromine
Cadmium

Chromium
Clays

Barium

Cement

Iron

Chromium

Copper

Magnesium

Mercury
Mica
Molybdenum

Limestone

Manganese

Nickel

Potash

Quartz

Pyrite

BG CS DA DE EL EN
FI FR HU IT NL NO
PL PT RO SK SP SV

Cobalt

Copper

Diatomite

Dolomite

Fluorite
Germanium

Granite

Graphite

Gypsum

Lead

Gold

Sandstone

Silica
Silicon
Silver

Sulfur
Talc

Tin

Tungsten

Uranium

Zinc
Zirconium

Zeolites

Before it's yours, we mine it.
Austria

euromines

7.2 EUROMINES PRIORITY AND SATISFACTION SURVEYS

Members' feedback is a valuable factor in determining the future working plans of Euromines, its priorities and its members' possible commitments. We care about the views of members, as we believe that our performance can improve if members can help us identifying our strengths and weaknesses. That is why Euromines secretariat has prepared two carefully tailored surveys.

Euromines Members' Prioritisation Survey

The aim was to assess national and European priorities at the same time and to provide all members with the opportunity of consolidated input into the future work programme of Euromines.

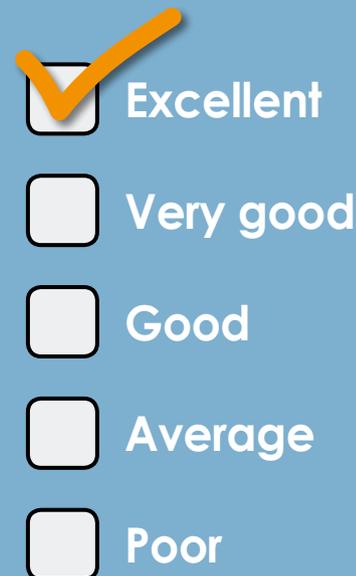
The Survey provided an assessment of the current national priorities and the views on what should be European priorities for the coming two years and it also provided an input into the EIP on Raw Materials and the commitments to be underwritten by Euromines member companies and associations.

Following the General Assembly in November 2013 and the decision to implement the results of the 2013 Prioritisation Survey by cutting the overall work programme by 20-30%, the various Euromines Committees reviewed the work programme for 2014. Eliminating the work items that had been finalised in 2013 or would be finalised early 2014 and removing all legislative items that were being delayed by the European Commission, still some decisions had to be taken. Projects that clearly did not get the support from more than 60% of the Euromines members were removed. As a result it has been possible to cut at least 20% from the various Committee work programmes. The current version of the work programme was adopted by the Steering Committee at the beginning of March 2014.

Euromines Members' Satisfaction Survey

The survey was intended to identify both strengths and weaknesses of the organisation and to assist the Secretariat in improving its performance. Having implemented the prioritisation survey and the cuts to the work plan it is hoped that some new approaches, as well as the revamped internal website with a clear overview of the on-going projects will assist members to have a better overview.

The intention is to carry out these surveys on an annual basis.



7.3 WORKSHOP ON COMMUNICATION WITH MEDIA

On 24th October 2013 a Workshop on communication with media took place in Brussels. The aim of the workshop on media relations and crisis management was to improve the media relations of Euromines and assist its members and to improve the response of Euromines and assist its members in crisis communications. This event was organized for Euromines members only and it provided an opportunity for valuable exchange of information and best practice between the participants.

The workshop was divided into three sessions.

- European Innovation Partnership on Raw Materials,
- Euromines Raw Materials Campaign Website,
- Handling Crisis Situations.



7.4 EUROPEAN MINERALS DAY 2013

Around 30,000 children and adults celebrated the 4th edition of the European Minerals Day on 24-26 May 2013 at their local quarrying or mining operations, to explore the fascinating world of minerals and discover how essential they are to our daily life. Overall, more than 170 events took place, organised by producers and national geological surveys at around 113 sites – quarries, mines or plants - in 24 countries all over Europe, and beyond. Through guided visits, visitors got the opportunity to learn more about today's sustainable mining practices, from exploration, extraction, sorting and mineral beneficiation processes, as well as the wide range of end-use applications, as well as good environmental practices.

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The European Minerals Day 2013 put particular focus on the key themes of the EIP including innovation and resource efficiency all along the value-chain. Whereas companies demonstrated the integration of these key concepts in their mining operations, the European Trade Associations partnering up under the European Minerals Day 2013, organised several events in the European Parliament for the EU stakeholders in Brussels thanks to the support of MEPs Rübzig, Panayotov, Leinen, Helmer and Szymanski and the European Commission. The exhibition entitled “The European minerals sector – an essential, innovative industry, throughout the value chain”, took place from 6-8 May 2013 and welcomed more than 500 visitors – with 150 stakeholders attending the successful launch by MEP Panayotov and Ms Benini, Member of the Cabinet of Vice-President Tajani. A high level dinner and raw materials conference took place as satellite events on 13 & 15 May 2013.

On 24 May, European Commission Vice-President Antonio Tajani launched, in person, the 4th edition of the European Minerals Day in Vipiteno, Italy. The Vice-President visited with great interest Omya’s modern and highly resource efficient underground mining operations, which linked perfectly to the Innovation and Resource Efficiency theme. The purpose was indeed to show that the European extractive industry is driven by resource efficiency and sustainability, and a partner in achieving the Europe 2020 agenda. Euromines was one of the organizers of the The European Minerals Day 2013 alongside IMA-Europe (Coordinator), CEMBUREAU, EuroGeoSurveys, EuroMetaux, EuSalt, and the European Technology Platform for Sustainable Mineral Resources (ETP SMR). Supporting organisations 2013: IndustriAll, EFG (geologists), ELO, EBCD, IUCN, Cerame-Unie and UEPG. More information on www.mineralsday.eu. The next edition will take place in May 2015.



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