

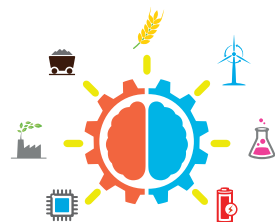


# Implementing the EIP on Raw Materials in selected EU Member States



*European Economic and Social Committee*





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# The European Innovation Partnership (EIP) on Raw Materials

The European Innovation Partnership on Raw Materials is a stakeholder platform that brings together representatives from industry, public services, academia and NGOs. Its mission is to provide high-level discussions and guidance to the European Commission, Member States, NGOs and private actors on innovative approaches to the challenges related to raw materials.

The European Innovation Partnerships (EIPs) are a new approach to EU research and innovation. By bringing together actors from the entire value chain they aim at streamlining efforts and accelerating market take-up of innovations that address key challenges for Europe.

The EIP on Raw Materials' aim is to help raise industry's contribution to the EU GDP to around 20% by 2020. It will also play an important role in meeting the objectives of the European Commission flagship initiatives 'Innovation Union' and 'Resource Efficient Europe'. It will do this by ensuring the sustainable supply of raw materials to the European economy whilst increasing benefits for society as a whole, maintaining its standard of living and providing jobs.

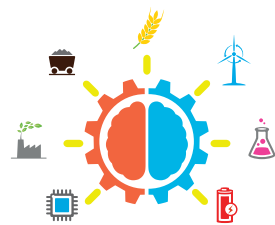
The EIP targets non-energy, non-agricultural raw materials. Many of these are vital inputs for innovative technologies and offer environmentally-friendly, clean-technology applications. They are also essential for the manufacture of new and innovative products required by our modern society, such as batteries for electric cars, photovoltaic systems and devices for wind turbines. With about 30 million EU jobs depending on the availability of raw materials the EIP will have a clear, positive impact on European industrial competitiveness.

The EIP's Strategic Implementation Plan (SIP) sets out specific objectives and targets. Actions to achieve these include research and development, addressing policy framework conditions, disseminating best practices, gathering knowledge and fostering international cooperation.

## The EIP on Raw Material's 2<sup>nd</sup> pillar – a New Formula

It is in the nature of the EU that Member States, and sometimes even regions, are the key holders to industrial and supporting raw material policies. Hence it was felt that addressing national, regional and local questions by stakeholder consultations in Member States is the best way forward:

- An active dialogue on national and regional economic policies and their relevance for raw materials supply issues;
- Stimulating engagement with a diversity of stakeholders and governmental institutions;
- Encouraging transparency and understanding of current challenges such as the limitations of current and future supply and discussion of possible solutions.



# Foreword

by Ms Lucie Studničná, CCMI President

The European Economic and Social Committee represents a bridge between the European institutions and organised civil society. Through its opinions, the EESC not only meets its obligations as an advisory body as provided for in the Treaties, but also fulfils an “educational mission” for the benefit of society and EU citizens.

Globalisation and technological advances are having a disruptive impact on human activities and on society as a whole. Industry is in a continuous state of restructuring, climate change and quality of the environment are a daily concern and the need for economic development and job creation is pitted against the societal and environmental challenges of the present and the future.

The extractive industries and concerns about policies on security of supply in energy and non-energy raw materials are some of the priority issues under discussion in the European Economic and Social Committee’s Consultative Commission on Industrial Change.

The quality and relevance of the CCMI’s opinions adopted in the last 10 years and the work it has carried out in partnership with the European Commission have led to the CCMI being recognised as a centre demonstrating the expertise of organised civil society in this area.

Late last year, to mark the start of the Juncker Commission’s term of office and the CCMI decided to hold four round tables in the course of 2015 - in Spain, Slovakia, Romania and Finland - on the Strategic Implementation Plan of the European Innovation Partnership on Raw Materials.

To ensure the quality and relevance of these debates, Mr Carlos Trias Pinto, president of CCMI at the time, invited European and national representative organisations involved in the implementation of the Raw Materials Initiative to join it as partners in organising the round tables.



The excellent collaboration between our teams (EESC, Euromines, IndustriAll Europe, EURACOAL and the European Commission), and partners in the Member States, enabled us to stage successful events that brought together more than 200 participants representing the social partners from the extractive industries or R&D specialists in the sectors covered by the European Innovation Partnership on Raw Materials.

This European framework for social and civic dialogue, which has been bolstered through the round tables held in Madrid, Bratislava, Bucharest and Helsinki, enabled all the partners involved, by means of a bottom-up approach, to feed into European public policy-making in sectors directly involved in ensuring the secure supply of raw materials for European industry.

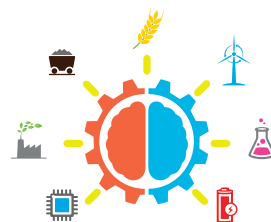
Both European and national partners provided working documents that served as a basis for discussions during the round tables. Here, the Consultative Commission on Industrial Change had the opportunity to promote a number of its relevant opinions such as: Non-energy mining industry in Europe; Access to secondary raw materials; Tackling the challenges in commodity markets and on raw materials; The processing and exploitation, for economic and environmental purposes, of industrial and mining waste deposits in the European Union; Competitiveness of the metals industries – A contribution to the EU’s growth and jobs strategy, etc.

The activities carried out in partnership in 2015 were greatly appreciated by the representatives of the two sides of industry and government institutions, which is why in the coming period, we will look into the possibility of holding similar events in other EU countries.

# Participating partners



- Euromines
- Eurocoal
- IndustriAll Europe
- European Economic and Social Committee
- European Commission
- Ministry of Economy and Competitiveness
- CONFEDERM
- National Trade Union Confederation MERIDIAN
- Romanian national Agency for Mineral Resources
- Polytechnic University of Bucharest
- ALMA MATER
- TVR
- Ministry of Economy of Slovakia
- Ministry of Environment of Slovakia
- FinnMin - Kaivannaisteollisuus ry
- The Federation of Finnish Enterprises



# Round-table series 2015

The round-table series 2015 was organized by the EESC's Consultative Commission on Industrial Change (CCMI) in partnership with relevant European and national organizations: Euromines, Euracoal, IndustriAll Europe, the European Commission and numerous national high level partners from academia, geological surveys, NGOs and civil society.

The Raw Materials Initiative and the European Innovation Partnership on Raw Materials are key policies that may contribute decisively to maintaining the competitiveness and sustainability of European industry, and consequently, the safeguarding or creation of new jobs, especially in regions that were affected by restructuring due to globalization.

These EU initiatives embrace whole value chains on which the European industry is based and now, in the first phase of the Juncker Commission, provide an excellent opportunity for the EESC and these partner organizations to promote their work and to demonstrate their constructive contribution and knowledge to both European institutions and citizens.

The aim of our round-tables is to also fulfil the mandate set by the European Commission for consultation and participation of civil society and social partners on the implementation of these initiatives.

## Topics addressed in the round-table discussions included:

- Production, trade and consumption of energy and non-energy raw materials;
- Political, legal, administrative and societal challenges related with the secure access to raw materials from EU sources;
- Secondary raw materials and aspects related to the concept of "circular economy";
- Health and Safety issues.

**The objective** of the round-table debates was to link the Member States' economic and industrial policy along the value chain from raw materials to end-products and to develop strategies and overcome obstacles to maintain a well-functioning European industrial fabric by improving investment conditions and creating new jobs.

## Other objectives of the round-table discussions included:

- Consultation and participation of civil society and social partners in the implementation process of European Commission initiatives on raw materials (Raw Materials Initiative, European Innovation Partnership on raw materials);
- Intensified dialogue on industrial policies and identify a method for the sustainable implementation at regional and local level;
- Identify and debate potential partnerships and projects to ensure:
  - Promoting economic and social development in Europe;
  - Solutions for the challenges faced by the entire production chain;
  - Consolidating policies on mineral resources;
  - Securing the supply of raw materials;
  - Reducing environmental impact;
  - Consolidating the research, development and innovation capabilities and expertise in this field.

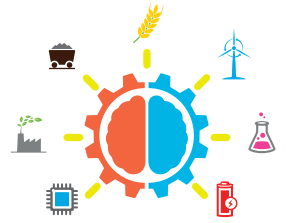
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## Main recommendations coming from the EESC Opinions on the Raw Materials Initiative

### In his opinions the EESC recommends the following:

- The policy in raw materials domestic supply should take into account industry, environment policy and land-use planning as an integrated approach. The best practice in the field should be extended to new potential areas. Access to domestic resources within the Member States should be encouraged by providing the necessary balance between the environment and industrial development policies, as well as harmonised incentives for development and protection in extending existing sites and opening new ones where these are, on the one hand, economically and socially viable and desirable and, on the other, environmentally sustainable;
- The globalisation impact on the international supply of minerals should be properly assessed by the EU and Member States whenever the import of raw materials from outside prevails. European environmental and social standards should be observed when considering investment policy and industrial relocation. Access to raw material should be guaranteed for European Users and the strategic dependence of the EU should be reduced;
- Capacity building in European non-energy extractive industries bears upon a wide range of challenges, such as administrative barriers, the need to improve the sector's image, the need for qualified manpower, management techniques, education and training;
- Improved efficiency of resource extraction processes depends on progress made in other sectors active in both mineral extraction and other areas and calls for cooperation between the European Commission and Member States;
- Better regulation through improved legal framework and permitting system; exchange of best practice in planning policies; cutting-down excessive administrative burden in the issuing of permits; facilitating exploration activities; promoting sustainable development in expanding extraction sites, and securing mineral deposits;
- Strengthening the compatibility of extraction and environmental protection by: extending best practice in and around Natura 2000; advocating the proximity principle in transport procedures in order to reduce pollution and costs, and improving access to resources;
- Reinforcing the mineral intelligence at the EU level by establishing a European geological capacity and a European Mineral Resources Information System, to be built on the basis of the capacities of the Member States' National Geological Surveys;
- The EU should actively pursue raw materials diplomacy with a view to securing access to raw materials, and in so doing, contribute to creating funds and programmes focusing on capacity building that would support sustainable raw materials production and economic and social progress in developing countries;
- An inventory of best regulatory practices in the EU with regard to access to land for raw materials industries should be prepared with the view to simplifying procedures and reducing the sterilisation of mineral resources resulting from inadequate land use planning practices;
- The Commission should foster an objective methodology based on a full life cycle analysis to assess the validity of resource efficiency measures and of any 'material substitution policy';
- The Commission's departments should strengthen recycling and facilitate the use of secondary raw materials in the EU and propose sound recycling, recovery and re-use strategies in non-EU countries by promoting best practices at international level.





# Madrid Round-table

The first round-table debate took place in Spain and was hosted by Confedem, the Spanish mining industry association. The event attracted high level representatives of the Spanish government, 6 regional ministries and authorities, the European Commission, industry, unions and NGOs. Participants explored future policies for investment and development of the extractive sector in Spain in a constructive dialogue. Following the round-table discussions the participants developed a series of recommendations for attracting and facilitating investments in Spain.

Round-table on Strategic Implementation Plan of the  
**European Innovation Partnership on Raw Materials**

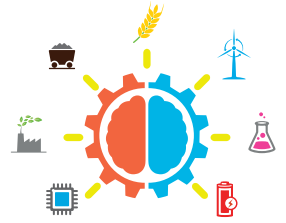
**3 March 2015**  
9 am - 2 pm

 CONFEDEM, Auditorium of  
the Foundation Gómez Pardo,  
Alenza nº 1, 28003 Madrid, Spain

    
    
[www.eesc.europa.eu](http://www.eesc.europa.eu)

The participants developed a series of recommendations for attracting and facilitating investments in Spain.





# Conclusions

## Whereas

- A fair, transparent, clear and predictable regulatory framework for investment is a critical determinant of investment decisions and their contribution to development;
- Governments can enhance the quality of the regulatory framework for investment by: consulting with interested stakeholders; simplifying and codifying legislation, including sector-specific legislation; drafting in clear language; developing registers of existing and proposed regulations; upholding collective agreements; expanding the use of electronic dissemination of regulatory material;
- Secure and well-defined land rights encourage new investments and the upkeep of existing investments as well as sustainable land management;
- Land administration should actively contribute to land use planning in order to ensure sustainable investment and balanced territorial development and help reconcile the different objective of land use;

it is recommended that Spanish authorities tackle the general business-related policies and regulations related to the raw materials industry that can attract/secure the investment and its impact on the economy.

## Selected recommendations for attracting and facilitating investments in Spain:

### Land and property rights

- Competent authorities should consider streamlining permitting procedures, the application of the one-stop-shop model, and the use of e-government solutions, such as on-line standard forms.

### Regulation and Policy Initiatives

- Development of a Minerals Policy (strategy), together with an appropriate action plan, with update when necessary, and properly disseminated. Strategies should be coherent between regional and local strategies where competences have been delegated.
- Where appropriate the national – or regional/local – policy and/or legislations need to include the concept of mineral deposit of public importance and define the infrastructure necessary to carry out the projects.
- Addressing the appropriate length of time and conditions of confidentiality of geological, exploration and resource data may accelerate the investments into raw materials extraction.


### Financial aspects

- Applying specific financial incentives and fiscal instruments to encourage investment in exploration and access to raw materials, such as tax rebates for research activities including prospecting and exploration.

# Bratislava Round-table


In April 2015, hosted by the Slovak Ministry of Economy, the second round-table debate was organized in Bratislava. All main partners of the Slovak mining sector participated in the meeting: the Slovak Ministry of Economy, the Ministry of Environment, the European Commission, the Technical University of Kosice, the coal and magnesia extractive industry, the steel industry, associations and unions. The key questions of the meeting were “How can the extractive industry underpin the Slovakian economic recovery?” and “What are the main drivers for the future demand for Slovakia and Europe and what are the key competitiveness issues of the industry in Slovakia?” Issues such as long-term competitive energy supply as well as obstacles to waste management issues across the industry were highlighted.



“What are the main drivers for the future demand for Slovakia and Europe and what are the key competitiveness issues of the industry in Slovakia?”



Round-table on Strategic Implementation Plan of the  
**European Innovation Partnership on Raw Materials**

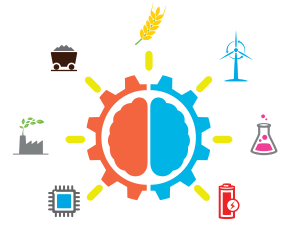
**17 April 2015**  
9:30 am - 1 pm

 **Hotel Arcadia**  
Františkánska 3  
811 01 Bratislava,  
Slovak Republic

    
**EURACOAL** **industrial**

[www.eesc.europa.eu](http://www.eesc.europa.eu)





“How can the extractive industry underpin the Slovakian economic recovery?”

## Conclusions

The energy and non-energy extractive industry could be a driver of both further growth and industrial diversification in Slovakia. The Slovak government had carried out its own assessment of “critical” raw materials for its industrial development along the lines of the EU’s assessment. However, the framework conditions for operating additional enterprises needed to be improved. In particular, parameters for sustainable, socially acceptable mining would have to be clearly established.

The Slovak Government confirmed its aim to create the right conditions for an effective, rational and sustainable development and the production and use of national raw material sources.





## Selected recommendations for attracting and facilitating investments in Slovakia:

### Regulation and Policy Initiatives:

Recommendation to renew the Slovak Raw Material Strategy to better reflect the needs of the whole value chain:

- **Avoiding sterilization of deposits – Land-use Planning**

In land-use planning, the existence of mineral deposits should be taken into account in the development of urban, highly populated or industrial areas, avoiding potential conflicts, on the basis of national / regional mineral strategies.

- **Support of regions affected by extraction**

Local communities are directly affected by any operations and their opinion has an influence on the permitting process. Effective engagement with local resident and other stakeholders is required.

Therefore it is important to develop best methods of cooperation with local communities and improve those already in place. There are different issues that need to be taken into consideration – local community benefits (direct and indirect), employment of local workforce, local infrastructure and environmental risks. Providing accurate information on these issues also helps to create a better public understanding of mining activities.

- **Safeguarding local energy supply**

Deployment of all conventional and unconventional energy sources, enabling competitive prices for energy intensive industries such as mining and down-stream processing industries.

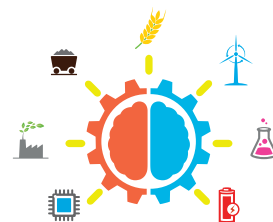
Energy prices have a great influence on overall mining and mineral processing costs. Many mining companies are fully integrated into globally operating value chains where additional local costs cannot be passed on to their customers for competitiveness reasons. Therefore, in any jurisdiction, mining requires competitively priced energy in order to benefit host communities over the long-term. From the energy sector it can be clearly stated that decoupling of economic growth from greenhouse gas emissions can and does occur where significant mining industries are present or even growing. High energy prices do not necessarily yield CO2 reductions where these are for example inherent in the processing of the mineral and yet they can affect the competitiveness of whole value chains. Long-term investment in more efficient mining technologies and processes is desirable, not the relocation of mining to non-EU countries.

### Education and skills:

Modernisation of education and training systems, including life-long learning, vocational training and dual learning schemes, which combine theoretical and practical teaching.

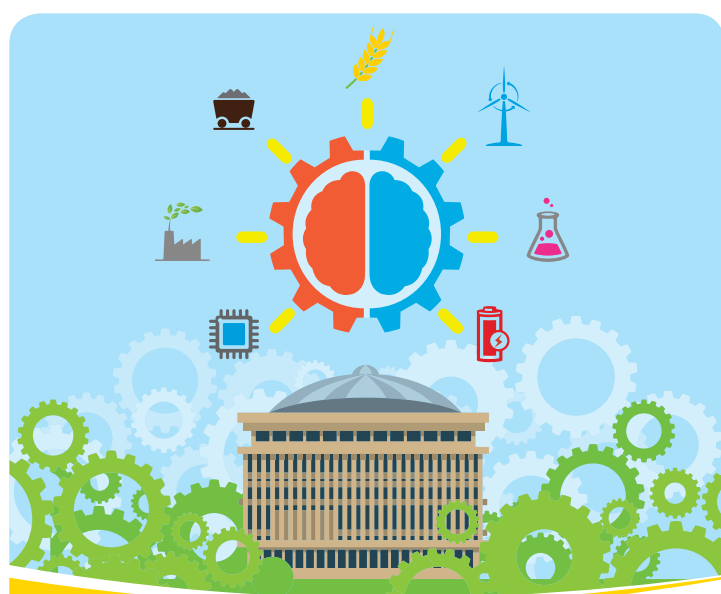
Support for job creation in the extractive sectors; labour mobility; and capacity building within competent authorities.

- National technological platform for research, development and innovations of raw materials.
- Legislative changes for high schools to achieve better qualified manpower.
- University reform with focus on technical education.



# Bucharest Round-table

In June 2015 the third round-table event was hosted by the Polytechnic University of Bucharest and was organised together with the EU University Day on Raw Materials with strong representation from academia. Among the other participants were representatives of the Ministry of Economy, Trade and Tourism, the European Commission, MERIDIAN the National Confederation of Trade Unions, industry, the Foreign Investors Council, the Geological Institute of Romania. The key subject of a half-day discussion was "How important is it to invest in research and how can the extractive industry support the recovery of the Romanian economy?"



## Round-table on Strategic Implementation Plan of the **European Innovation Partnership on Raw Materials**

**4 June 2015**  
9 am – 2 pm



Polytechnic University of Bucharest, Rectorat building,  
Senat room, Splaiul Independentei nr. 313, sector 6,  
Bucharest, Romania

  
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Trade and Tourism

  
MERIDIAN

  
Geological Institute of  
Romania

  
Foreign Investors  
Council

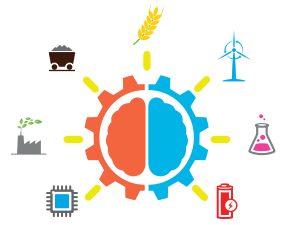
  
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"How important is it to invest in research and how can the extractive industry support the recovery of the Romanian economy?"







# Conclusions

## Regulation and Policy Initiatives:

- Having closed down many uncompetitive mines during the EU accession Romania today has been switching from a country exporting less raw materials to a country utilising them to rebuild its economy. Romania has still considerable resources which should be assessed from a sustainable economic strategy.
- However, with a slowly increasing standards of living and an increasing demand over time, Romania must take on the duty of promoting raw materials as the basis for long-term development, and it must therefore create specialised institutions and educate a larger number of professionals in the sustainability of raw materials.
- In Romania, civil society is still divided, and the government does not always communicate with and consult civil society effectively or consistently in its decision making processes. Without a social consensus, mineral and human resources cannot materialize into economic growth. Social and institutional structures need to be rebuild and become the guardians of sustainability and transparency.

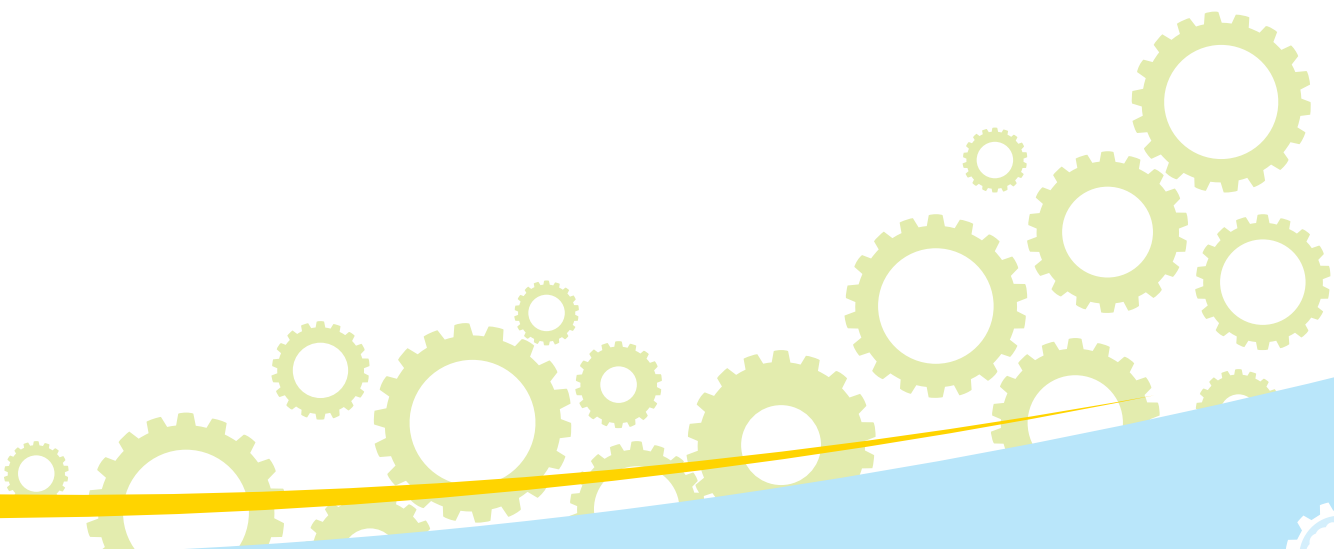
## Education and skills:

- There is an acute shortage of human resources in the entire extractive sector in Romania. Human resources, the level of training of the workforce and the number of students are presently insufficient to ensure the sustainable re-launch of industrial production in Romania.
- Education is one of the premises for restarting the re-industrialisation process.

## Next steps:

The Romanian Academy should devise a re-evaluation study of mineral resources in Romania, which will be published in the following 2-3 years.

Partnerships should be established with civil society organisations to lead to the reintroduction of Romanian raw materials in the economic circuit and promote a circular economy, not only from the perspective of making use of secondary raw materials, but also re-assessing old sites with modern technologies and making them accessible for potential investors with the aim to create new regional growth.



# Helsinki Round-table

The representation of the European Commission in Helsinki hosted the fourth round-table debate, this time focussing on Sustainability and the Green Strategy for Mining in Finland. The main themes were the exemplary "Finland's and Finnish Regions' economic policy and related raw material strategy" and the topic of "Corporate Social Responsibility: Sustainable mining and relations with stakeholders". An active debate between the various representatives of the Ministry of Employment and Economy, the Finnish Mining Industry, the European Commission, the Finnish Steel and Metal Producers, the Geological Research Centre of Finland, the Finnish Export Organization, and the Network of Sustainable Mining explored the strong points of existing strategies, but also highlighted room for improvement.

"Corporate Social Responsibility: Sustainable mining and relations with stakeholders".



Round-table on Strategic Implementation Plan of the  
**European Innovation Partnership on Raw Materials**

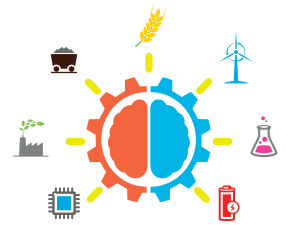
**7 September 2015**  
1 pm – 5:30 pm

Representation of the European Commission  
in Helsinki, Europe Hall, Malminkatu 16,  
00101 Finland

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# Conclusions

## **Regulation and Policy Initiatives:**

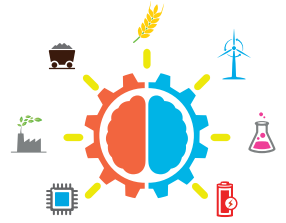
- Follow-up of the “Green Mining strategy for Finland” to ensure long-term sustainability and public acceptance.
- Continuing the Finnish Mining Investment Facility to increase the attractiveness of Finland as a place for investment to provide seed money for new projects.
- Ensuring compatibility of nature protection and extraction. A widely informed and balanced assessment of the different options to determine the extractive sites. These options should also include otherwise protected areas in case the respective special legislation does allow this. There should be no automatic exclusion of raw-material extraction activities in and around potentially sensitive areas (e.g., Natura 2000). Instead, extractive activities shall ensure that these activities do not adversely affect the values of such sites. Full application of the European Commission Guidance on Non-energy mineral extraction and Natura 2000 is necessary. Capacity building and co-operation of authorities in charge of minerals extraction and land-use planning is needed (to consult widely and to identify, classify and safeguard mineral deposits).

## **Education and skills:**

- Continued and adequate funding for the KIC on raw materials and support for higher education.
- Continued support for access to finance and investments, in particular in research & innovation as well as training, re-skilling and up-skilling to adapt to new technologies and work practices.

## **Social acceptance:**

- Close cooperation with local communities that are concerned with their cultural heritage and traditional ways of life and developing mutually acceptable strategies for regional development and economic growth.



# Summary Recommendations Round-tables 2015

The series of round-tables has shown a huge diversity in terms of awareness of EU policies on raw materials, on relevant linkages between supply chains, a diversity of opportunities missed and challenges to be tackled. The round-tables have also clearly shown that the cultural and historical development in each country brings elements to the debate that need to be addressed before real progress can be made.

In each country, starting points, their stages in the wider debate, and the relationships between stakeholders are all different and are clearly determining factors in the speed of progress.

But all participants are actively contributing and it is hoped that these round-tables can be continued.

In summary the following issues in varied degrees of concern and importance could be drawn:

- **Access to raw materials resources**

A transparent and clear framework in terms of exploration and access to deposits is a minimum requirement;

- **Land and property rights**

Gaps and challenges in land-use planning practices should be identified (application of the one-stop-shop model, use of e-government solutions);

- **Social Dimension and labour market**

Strong anticipation mechanisms in view of technological and skill developments are needed;

- **Regional trade agreements and integration**

Explicit political support for mining as a particular growth strategy;

- **Promoting investment in Skills & Innovation**

Support access to finance and investments in Research & Innovation;

- **Supporting industrial competitiveness**

Industrial competitiveness should be considered across all policy areas;





- **Energy price**

Enabling competitive prices for energy intensive industries;

- **Competition**

Identify and protect European industries against unfair competition;

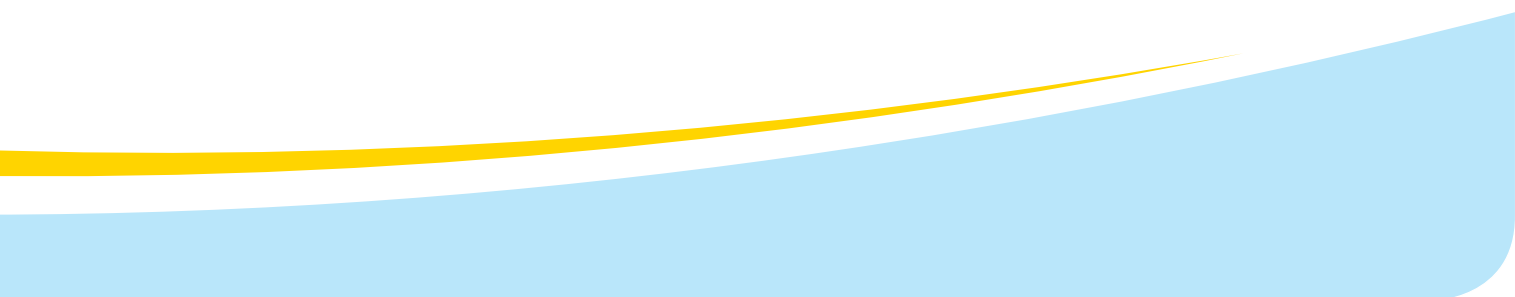
- **Regulation and Policy Initiatives**

Development of a Minerals Policy (strategy) together with an appropriate action plan and include the concept of mineral deposit of public importance;

- **Financial**

Applying specific financial incentives and fiscal instruments to encourage investment and establish National Investment Facility to provide money for start-ups.

Following its various opinions adopted over the years the EESC has managed to bring together key stakeholder and instigated a dialogue that will hopefully be continued in the coming years in these countries and in others.





Visit our webpage

[www.eesc.europa.eu/?i=portal.en.industrial-sectors-mining-raw-materials](http://www.eesc.europa.eu/?i=portal.en.industrial-sectors-mining-raw-materials)



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