

European Mining Sector – Contributing to EU Priorities and demonstrating best practice

Rolf Kuby, Director General
General Assembly of BCMG, 19th April 2022

Euromines

European Association of Mining Industries,
Metal Ores & Industrial Minerals

Sustainable Mining



29

Cu

Copper

50

Sn

Tin

14

Zn

Zinc

12

Mg

Magnesium

79

Au

Gold

Sustainable
Mining



28

Ni

Nickel

20

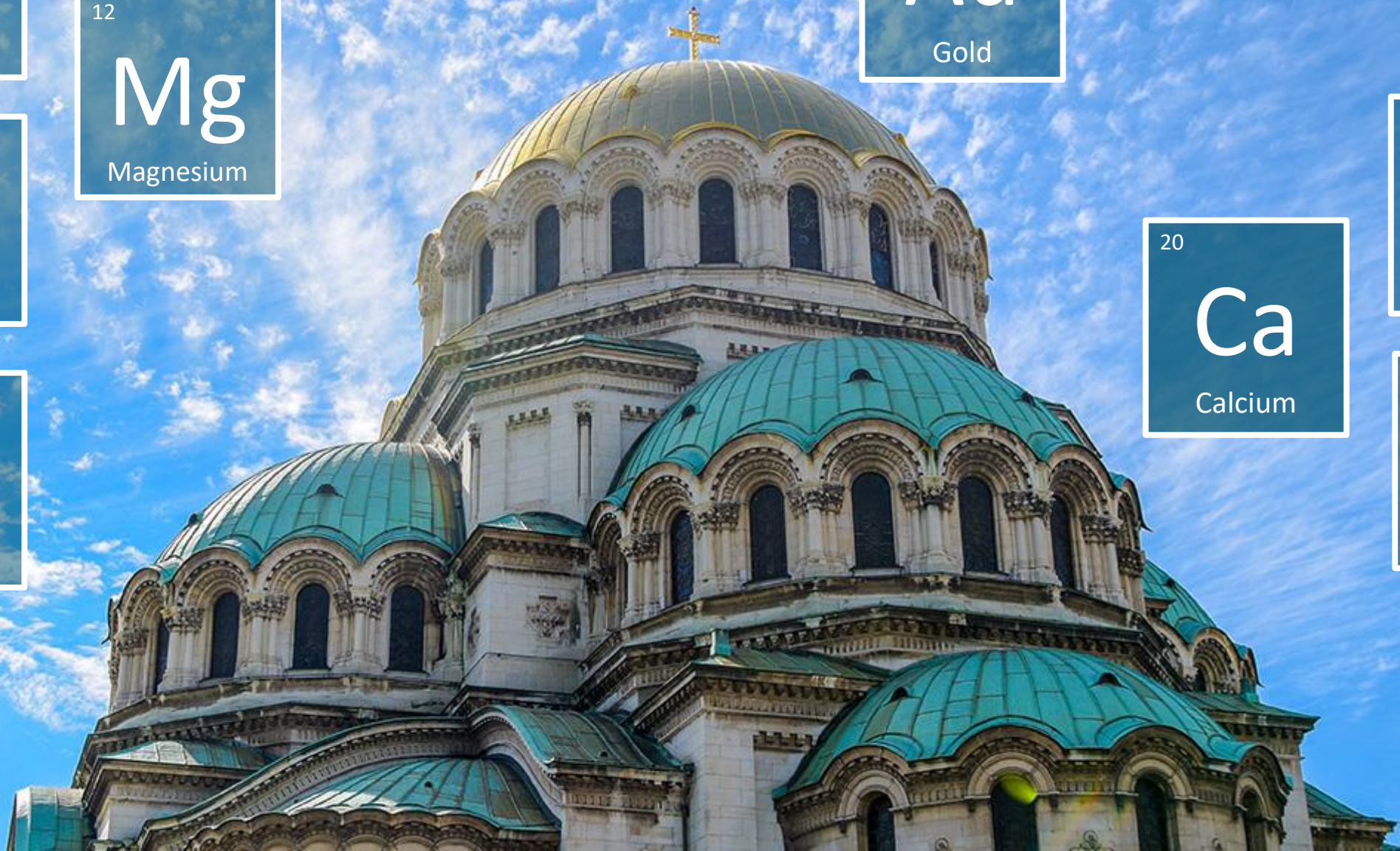
Ca

Calcium

26

Fe

Iron



Your Representation ⇨ Our Commitment



Euromines



≡ **Recognised representative** of the European metals and minerals mining industry;



≡ **Strong proactive partner** in political lobbying and service provider to its members, politics, media and society;



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

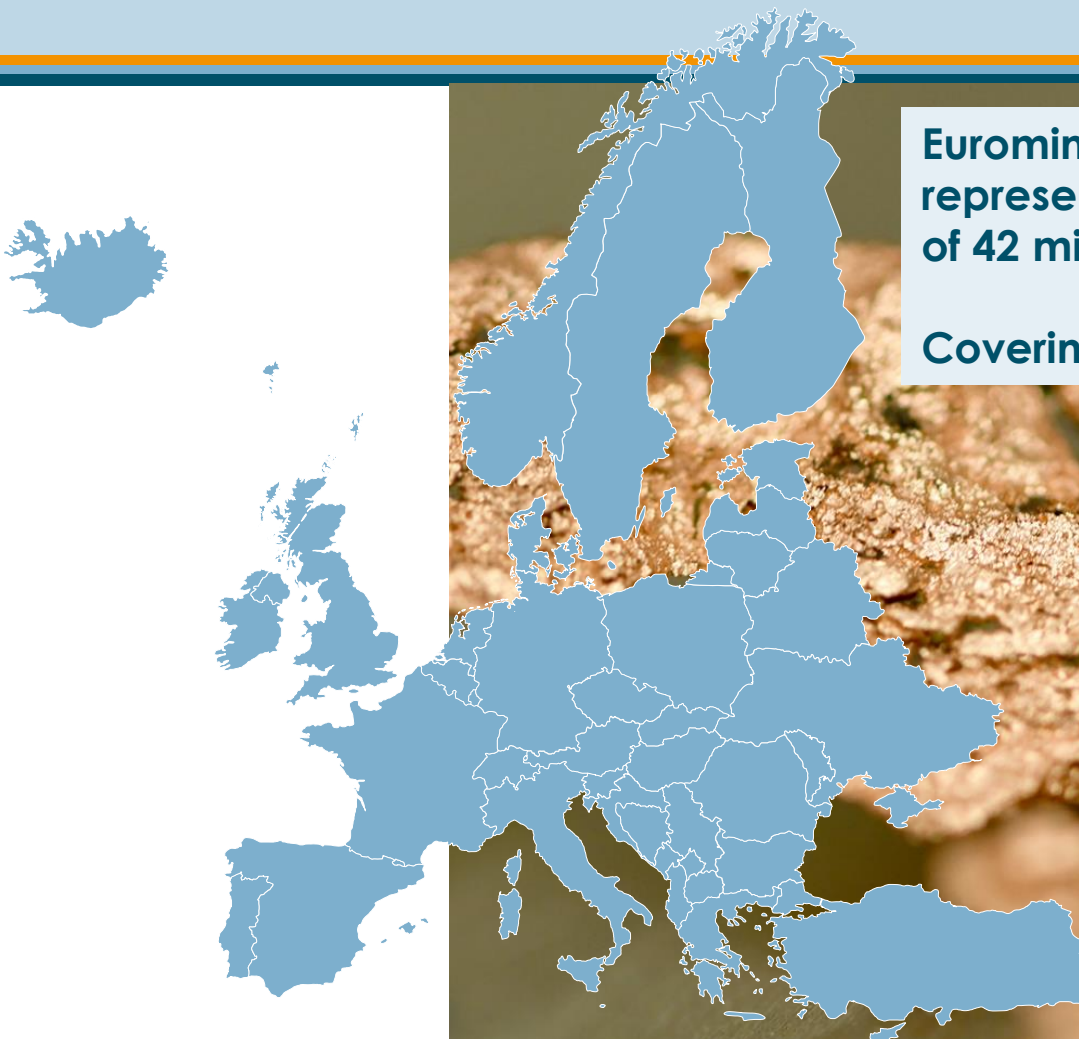


≡ **Link to contacts** with the mining community throughout the world.

Your Business ⇒ Our Voice



- ≡ Represents large and small companies and subsidiaries in Europe and in other parts of the world;
- ≡ Representing **350,000 jobs**;
- ≡ Representing **42 different metal ores and minerals**;
- ≡ For some metals and minerals, Europe is the world's leading producer.



Euromines has a high representativity of EU production of 42 minerals and metal ores

Covering most of Europe

Your Source of Information ⇒ Our Services



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

- ≡ Euromines activity towards EU Institutions:
 - = **Participating** in EU institution political environment (Industry Forum, ERMA, EIT RM ...)
 - = **Monitoring and evaluating** EU policies and their impact on the sector;
 - = **Providing** inputs and comments to the EU institutions on issues related to the industry;
 - = **Preparing** Euromines' positions on EU documents relevant to the sector;
 - = **Promoting** the sector's contribution to sustainable development to the European Institutions.

Your Interface ⇒ Our Contribution



Mark Rachovides,
Euromines
President



Rolf Kuby,
Euromines
Director General

Euromines



≡ Defines common industry positions and actions.



≡ **Builds strategic alliances**, "together we are stronger"



≡ **Establishes a constructive dialogue** with the governmental institutions in order to ensure early consultation in all those areas of EU policy and legislation affecting the industry, and to assert the industry's views and positions.



≡ **Advocates** for the European mineral raw materials industry by promoting the benefit and societal value of both its activities and its products.

Euromines Team



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Your Needs ⇒ Our Objectives



- ≡ **Competent and appreciated point of contact** for politicians, administrations, media and civil society.
- ≡ **Respected service provider** for members, downstream users and decision makers.
- ≡ **Sustainable, responsible and visible actor**, who is recognised as being an indispensable part of society.
- ≡ **Advocate** who maximize opportunities and minimize risks for the members.
 - = Support industry's license to operate.
 - = Foster international competitiveness.
 - = Secure fair markets.



Your Status ⇒ Our Communication Objectives

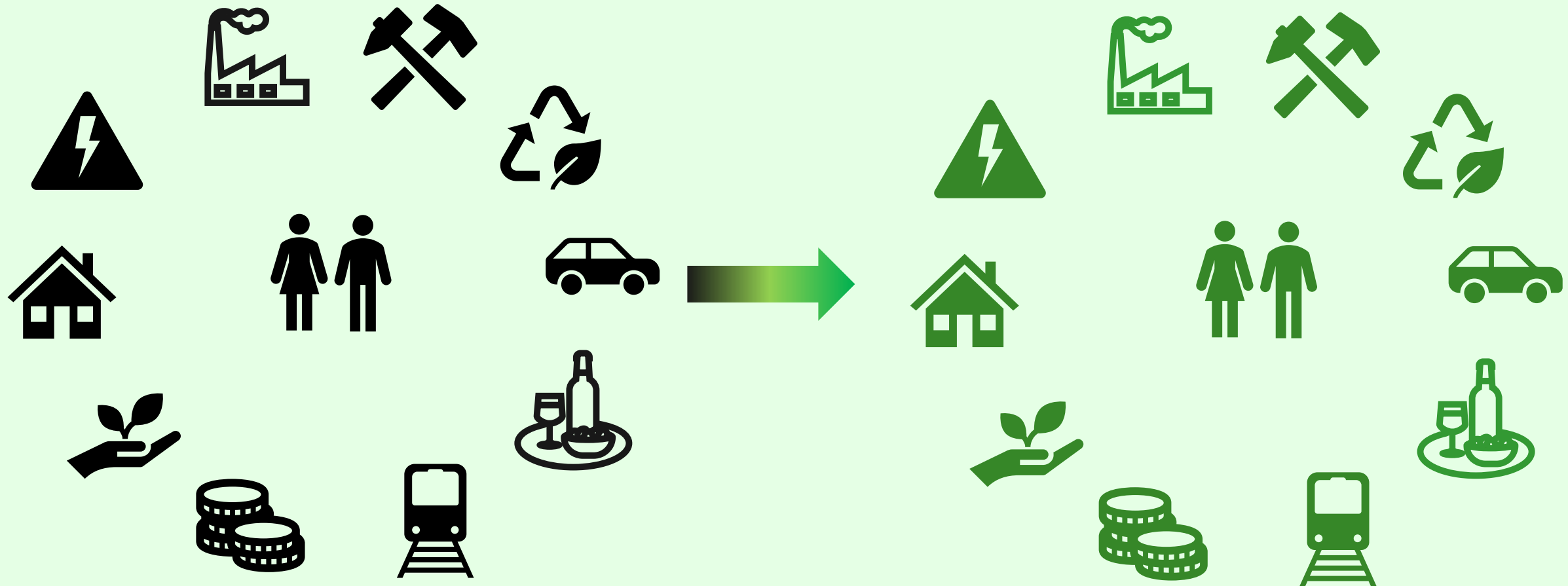


- ≡ Through Euromines promote the sector as a **contributor to sustainable development** in Europe → to recognise the role the industry plays in society.
- ≡ To promote the industry towards the European authorities as **sustainable**
 - = an economically crucial sector,
 - = a responsible environmental sector,
 - = a responsible and relevant employer,
 - = an innovative sector.
- ≡ To further strengthen Euromines as the **voice for its membership** and for the industry in Europe and beyond.
- ≡ To improve the **image of the industry**.



**SUSTAINABLE
DEVELOPMENT GOALS**

Systemic change – increased demand



Green Deal

New regulatory direction

- ≡ Fit for 55
- ≡ Sustainable Finance
- ≡ Corporate Governance
- ≡ Biodiversity and soil strategy
- ≡ Industrial Emissions Directive



Risks and chances for mining

- ≡ License to operate
- ≡ Societal acceptance
- ≡ International competitiveness
- ≡ Fair business practices
- ≡ Contributing partner for resilience and prosperity
- ≡ Increased focus on value chain and raw materials security

Sustainably mined metals and minerals



Mineral Raw Materials are the lifeblood of the economy



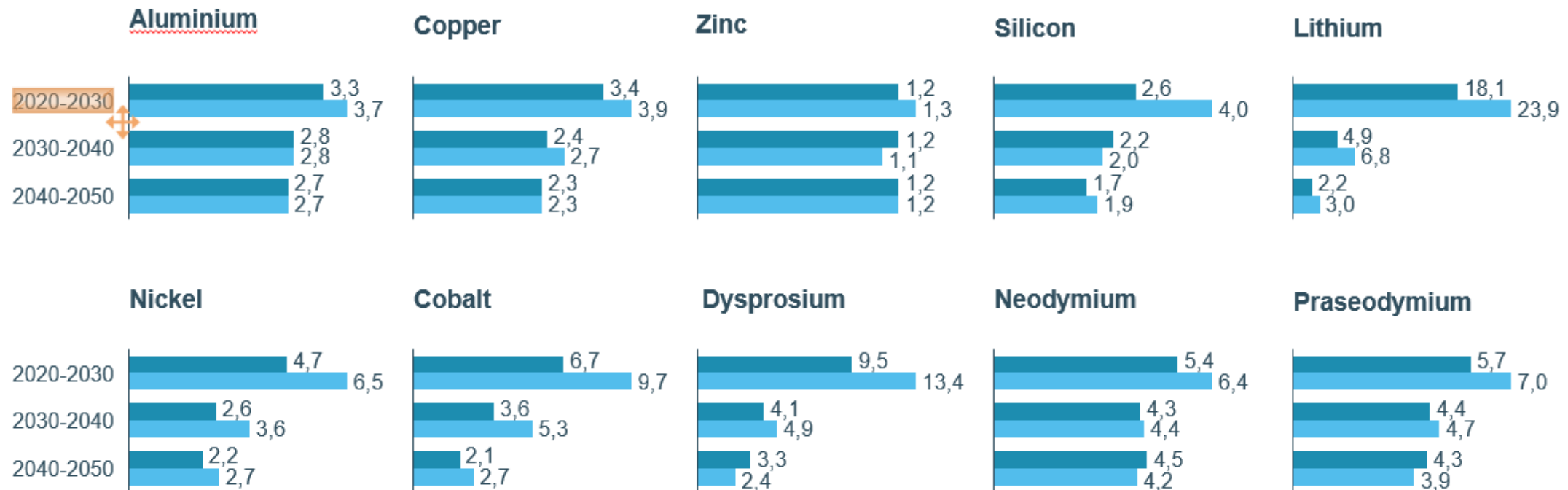
- ⇒ The **more ambitious the climate targets** the faster **more raw materials** are needed.
- ⇒ International Energy Agency predicts an **increase of up to 6 times overall and up to 42 times for specific minerals**
- ⇒ Potential for **recycling 30-40 % up to 2030** will not be sufficient to achieve the stock for a **functioning Circular Economy**
- ⇒ **European primary raw materials** mitigate supply risks while demonstrating the highest environmental and sustainability performance.
- ⇒ Raw materials depending industries in the **EU provided 206 billion EUR of added value** (EU Raw Materials Scoreboard, 2018)

Ramping up minerals supply – big push till 2030



Expected annual growth rate per decade by commodity (Global)
%

■ Steps (Current policy)
■ SDS (Ambitious climate)

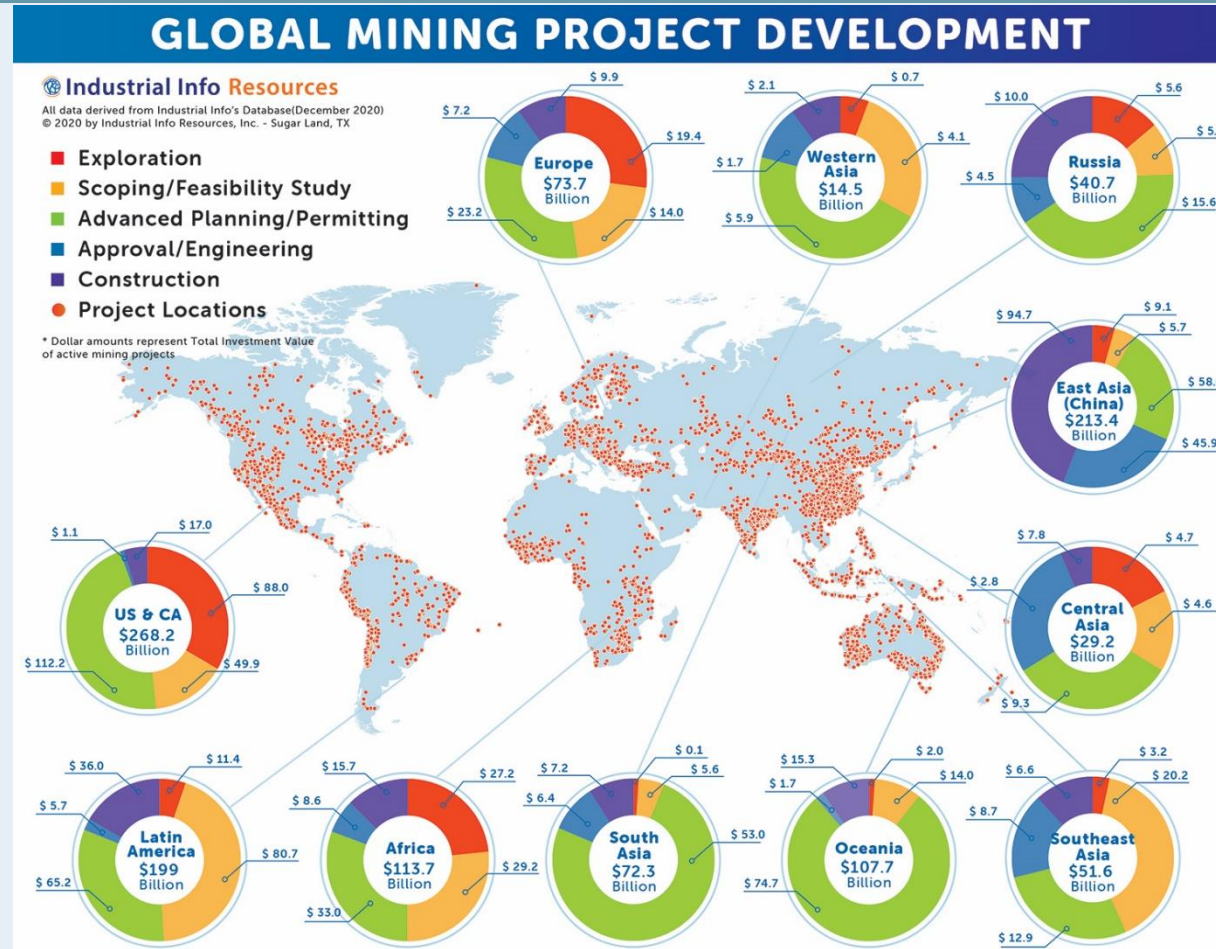


Mining growth prospects worldwide

Worldwide
13,000 mining
projects

\$1.18 Trillion in
total investment
value

**\$ 73,7 Billion in
Europe
= 6%**



**2021 Global Mining
Investment Outlook**

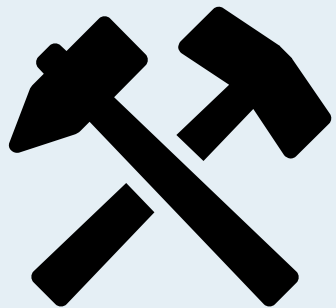
Strengthening resilience, supply and sustainability – 5 key priorities

Sustainable
Mining



1. Tap the potential of EU raw material deposits
2. Diversify supply chains and strengthen access to raw materials
3. Recognise sustainable mining practices – at home and abroad
4. Foster a level playing field
5. Streamline raw materials across EU external actions, cooperation and diplomacy

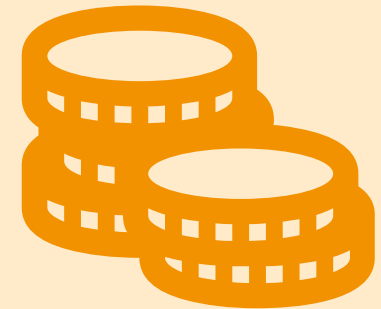
Priority 1: Tapping EU's raw material potential – IPCEI Important Projects of Common European Interest



A matter of market failure,
outsourcing of EU, competitive
disadvantage and geostrategic
security that limits potential jobs
creation and skills development



**IPCEI on sustainable raw materials
for the Green Deal infrastructure**

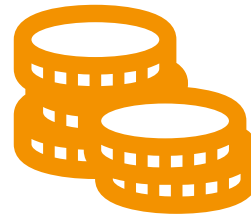


Priority 2: EU Raw Materials Investment Fund

Promoting intra EU-cooperation



- ≡ Developing high potential for new local mining sources & production
- ≡ Diversifying supply to the EU
- ≡ Strengthen EU value chains



10 bn €

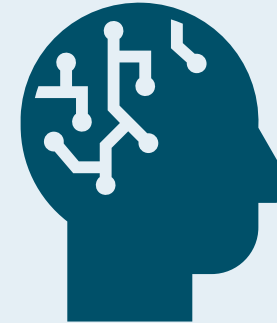
=

5 bn €
state
aid

&

5 bn €
equity

Catching-up



- ≡ Unblocking and de-risking local raw materials projects
- ≡ Implementing the EU sustainable principles and demonstrate the EU environmental leadership
- ≡ Creating innovation and jobs

Priority 3: Promoting sustainable mining

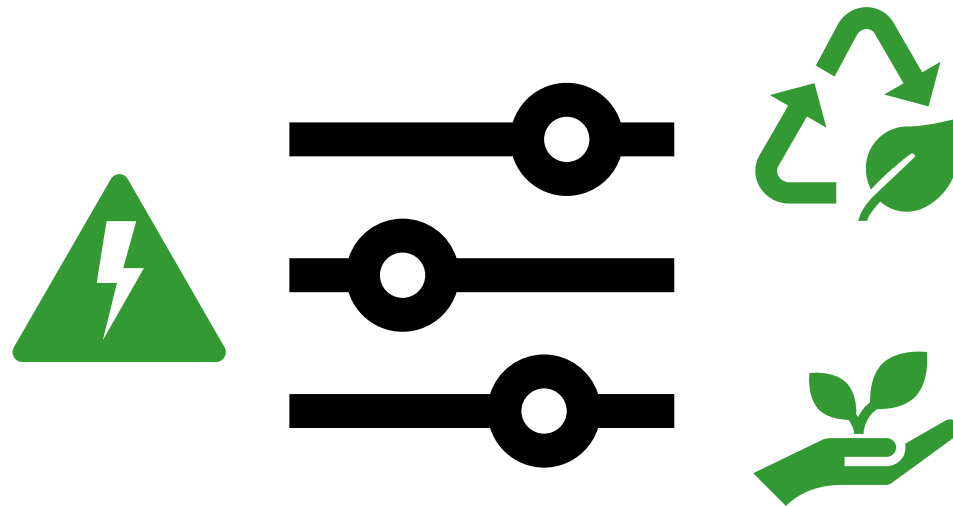
- ≡ Sustainable Mining as a seal of distinction
- ≡ Communication, stakeholder involvement and addressing NIMBY
- ≡ Mining recognition in the Taxonomy
- ≡ Regulatory framework adaption



- ≡ Creation of lead markets
- ≡ Dissemination of best practices at home and abroad
- ≡ Education campaigns
- ≡ Indirect CO2 cost compensation

Priority 4: Level playing field

- ≡ Geostrategic approach to security of supply
- ≡ Addressing market failures
- ≡ Use of sustainability design in products
- ≡ Leveraging the Single Market



- ≡ Addressing sustainability cost drivers: energy
- ≡ Tackling environmental/sustainability dumping
- ≡ Enabling sustainability investments

Priority 5: Streamlining raw materials

- ≡ Mapping EU raw materials potential
- ≡ Addressing future criticality risk and infrastructure needs, in the EU and its neighbourhood
- ≡ Dedicated Raw Materials Diplomacy
- ≡ Raw materials partnerships



- ≡ New economic statecraft internalizing
 - ≡ Environmental protection
 - ≡ Development of human capital
 - ≡ Democratic development

- ≡ Dedicated International Raw Materials Access and Trade policy
- ≡ Investment support to mining projects around the EU
- ≡ Streamlining standards – expanding Global Gateway scheme



Sustainable Mining in Europe

Sustainable Mining for Europe

Sustainable
Mining



A microscopic view of several small, irregular gold flakes. The flakes are bright yellow-gold and have a textured, crystalline appearance. They are scattered across a light-colored, slightly grainy background. A semi-transparent dark teal rectangle is overlaid on the bottom half of the image, containing white text and a logo.

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