



RMI Implementation and progress so far

**MIN WIN-WIN: ESTABLISHING EUROPE-WIDE MINERALS REPORTING
STANDARDS – THE KEY TO REDUCING RISK AND INCREASING
OPPORTUNITY**

Brussels, 20-21 November

European Commission

Directorate-General Enterprise and Industry

Slavko SOLAR

Unit F3 « Raw Materials, Metals, Minerals, and Forest-based industries »



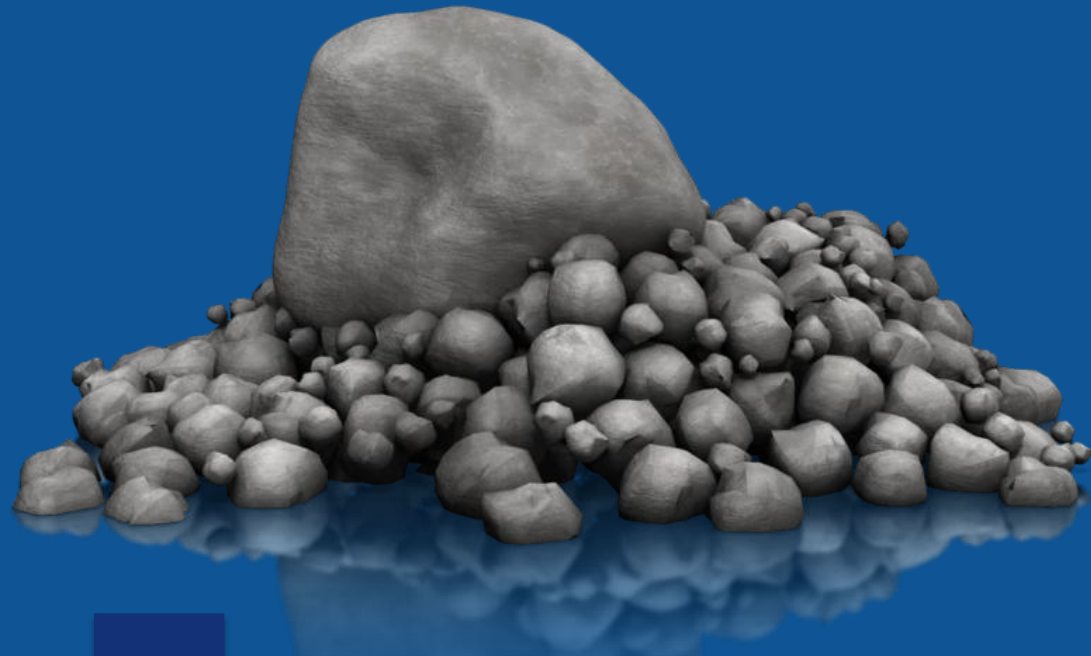
Content

Raw Materials Initiative

***European Innovation Partnership
H2020 call 2014/2015***

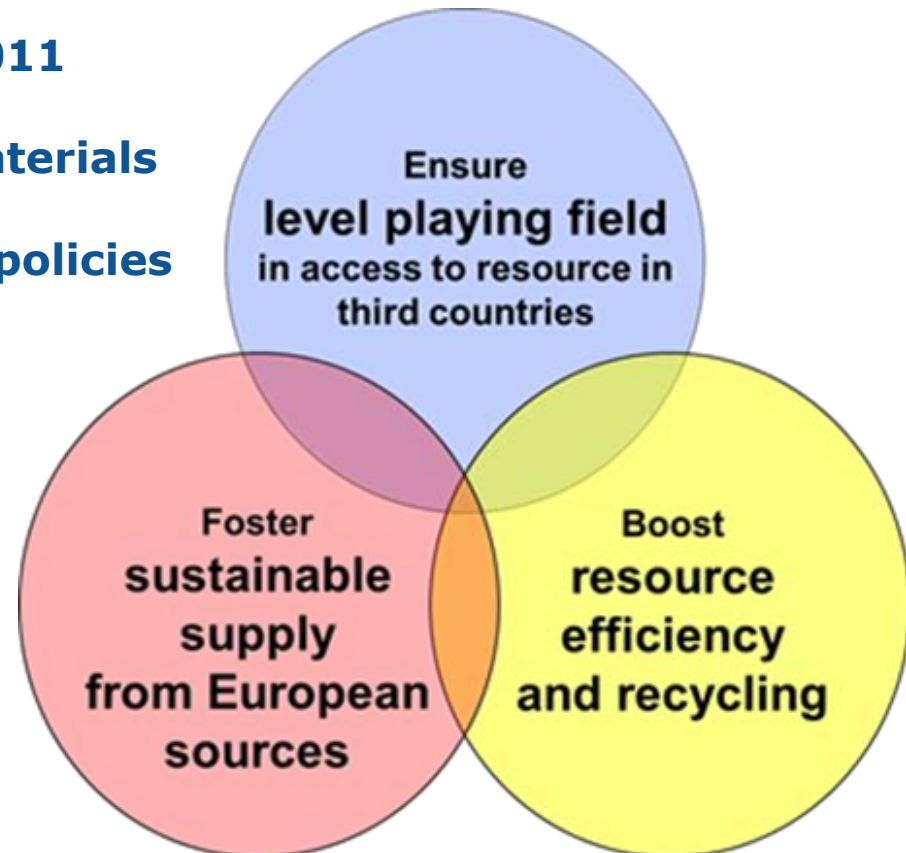
- **Goal: industry's share of GDP to be 20%**
- **Key priorities:**
 - A more business friendly framework;
 - Financial resources to make the industrial renaissance happen;
 - **Easier access to critical production inputs (finance, raw materials, energy);**
 - Maximise the potential of the Internal Market;

Raw Materials Initiative



EU “Raw Materials Initiative”

- **Aim:** securing sustainable supplies of raw materials
- **Launched in 2008, consolidated in 2011**
- **Non-energy, non-agricultural raw materials**
- **Connecting EU external and internal policies**
- **Integrated strategy (3 pillars)**
- **Introduced list of Critical Raw Materials (CRM) in 2010**



Annual report on the implementation of the Raw Materials Initiative – 24.06.2013

Fair and sustainable supply of raw materials from global markets (1st Pillar)

- EU trade strategy for raw materials
- Raw materials diplomacy
- Assistance to developing countries

Fostering sustainable supply within the EU (2nd Pillar)

- Exchange of good practice between EU Member States
- Enhancing EU knowledge base
- Promoting research and skills

Boosting resource efficiency and promoting recycling (3rd Pillar)

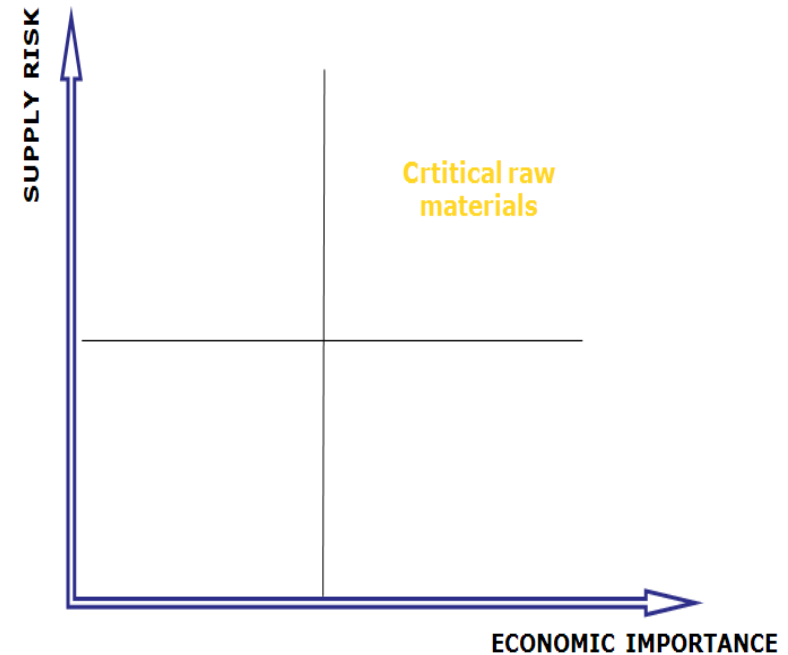
- Better implementation and smarter EU waste legislation promoting resource-efficiency & recycling
- Strengthen the enforcement of the EU Waste Shipment Regulation

Economic importance

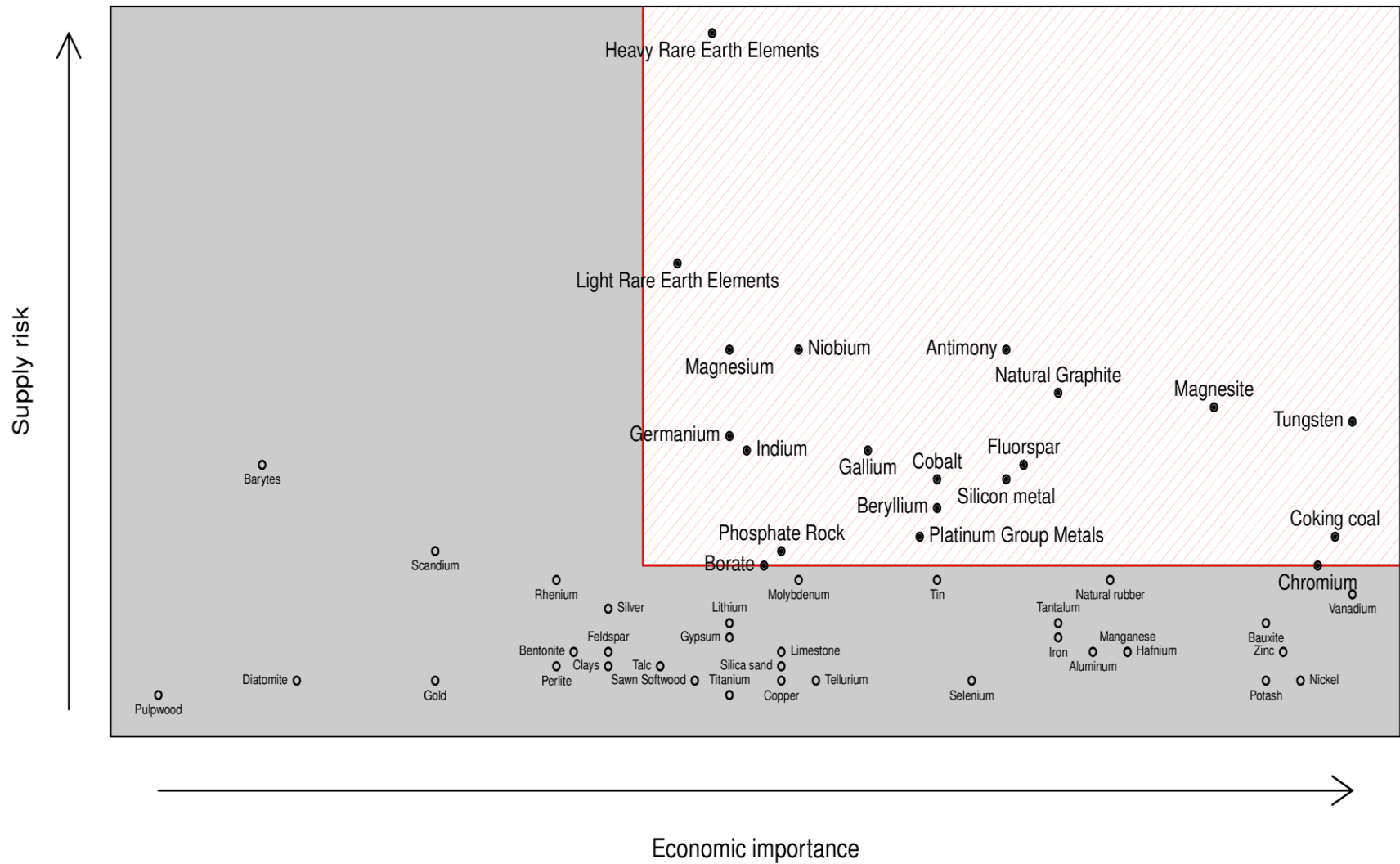
- Importance of a raw material per economic sector & importance of the sector in the EU economy

Supply risk

- Political and economic stability
- Level of production concentration
- Potential for substitution
- Recycling rate



Outcome 2014





- Already in the old CRM list (2010)
 - Antimony, beryllium, cobalt, fluorspar, gallium, germanium, HREE, indium, LREE, magnesium, natural graphite, niobium, platinum group metals, tungsten
 - All except tantalum,
 - In the old candidate list but new to CRM list 2013
 - Borate, chromium, magnesite
- New to candidate list (and CRM list) 2013 (published in 2014)
 - Coking coal, phosphate rock, silicon
- CRM list 2013 is larger than in 2010
 - 20 raw materials classified as “critical” → extended fiches
 - 40% of the candidates classified as “critical” → higher than 2010 ($\approx 1/3$)



Critical raw materials list as a policy tool:

- Contribute to the implementation of the EU industrial policy
- Incentivise the European production of critical raw materials and facilitate the launching of new mining activities
- Monitor issues of critical raw materials to identify priority actions (trade, legislation, research)
- Policy actions not limited to critical raw materials exclusively

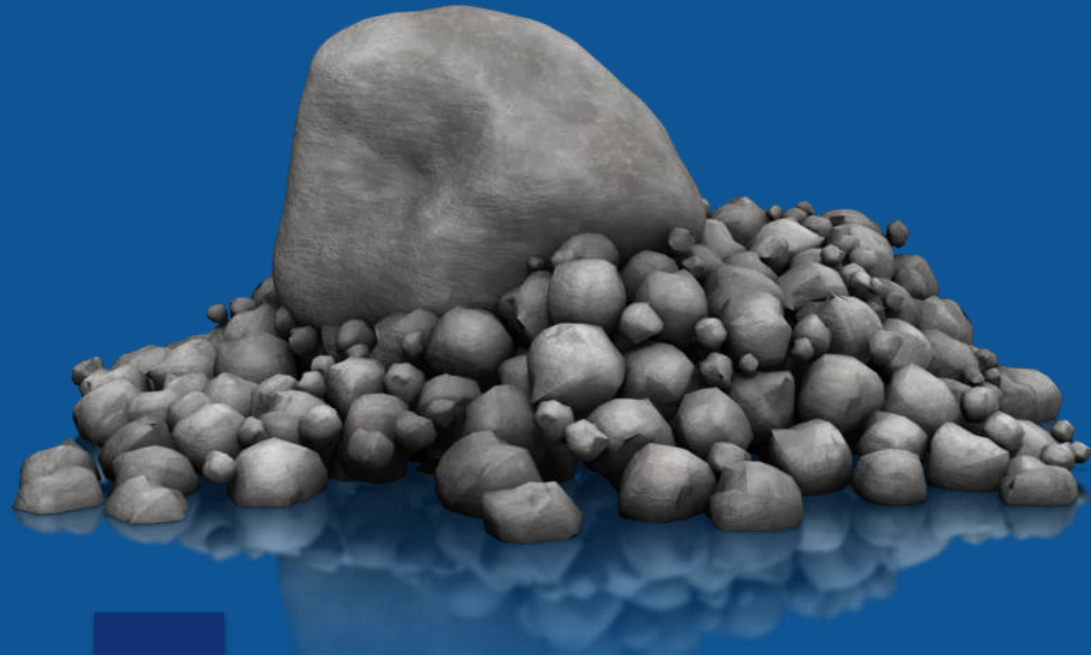
European Partnership on Raw materials

Horizon 2020

- Mining and processing
- Recycling
- Substitution

Raw Materials Initiative

I. pillar



Based on:

- dialogues where EU and partner countries collaborate with higher mutual benefit***
- dialogues established by Letters of Intent***

Foreseen 4 events to take place in 2013 - 2015

Letters of intent signed by VP Tajani with: Argentina, Uruguay, Colombia, Mexico, Chile, Peru, Greenland, Morocco, Tunisia, Myanmar.



**EU – US – Japan workshop on Criticality
2 December 2013**

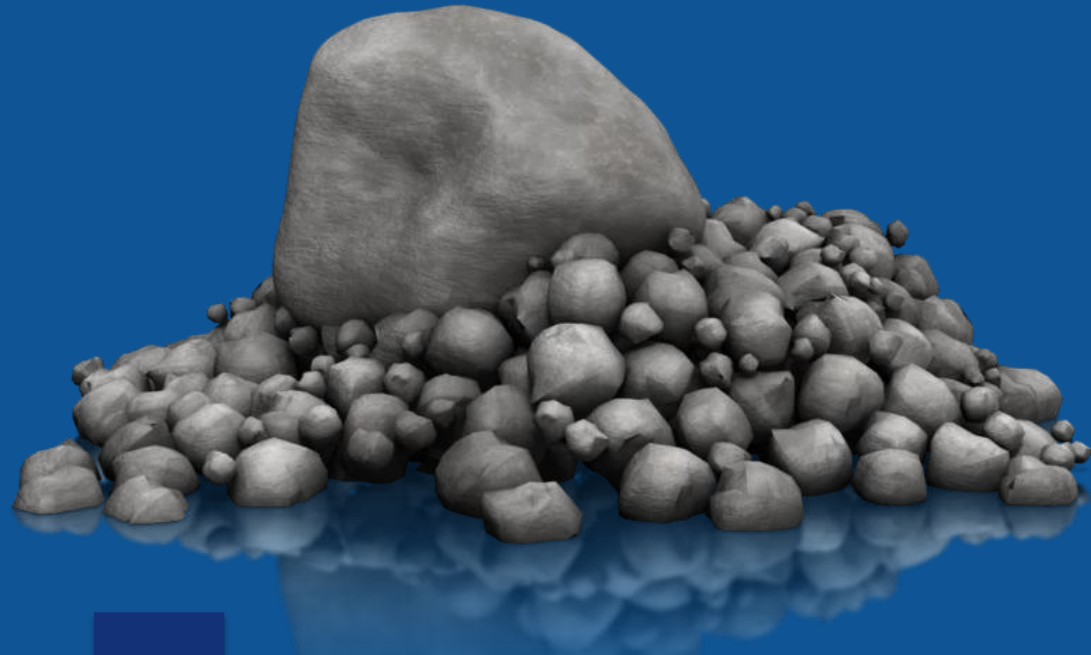
**EU - Latin American dialogue on Raw
Materials, Lima, Peru, 10-11 March 2014**

**Workshop: best practices on mining policies
& technologies, Brussels, 12-13 June 2014**

***EU - African Union workshop
March 2015 Brussels***

Raw Materials Initiative

II. pillar





- MINERAL POLICY FRAMEWORK
 - Reactivation of the RMI AHWG 2 – **Recommendations** based on
 - Report on National Minerals Policy Indicators
 - Evaluation and Exchange of Good Practices for the Sustainable Supply of Raw Materials within the EU
- EU KNOWLEDGE BASE
 - Competitiveness of the EU Mineral Raw Material Sector
 - Study on Data Inventory for a Raw Material System Analysis
 - Minventory – EU Statistics on Reserves and Resources
 - Knowledge Base Architecture - Overview



- Input:
 - Indicators questionnaire campaign through RMSG email list and to the EU 28 and 9 more countries
 - Replies: 18 Member States, Norway and Turkey: some replies on regional level (2) and 4 replies from the industry
- Indicator's pyramid
 - Legal framework
 - Information framework
 - Land use planning
 - Authorisation and permitting
- Interpretation of results
 - Answers in three reply classes
 - Overall evaluation gives equal weight to all indicator groups
 - Only Member States' replies were evaluated and ranked.

Raw Materials Evaluation and Exchange of Good Practice Project

Recommendations

❖ ***Good practice identification***

- ❖ 25 cases should be recognized good practice
- ❖ Opportunity should be taken to up-date and extend them to cover other issues and themes
- ❖ Based on an assessment of performance
- ❖ Encouragement of the use of reporting frameworks, - on a voluntary basis

❖ ***Policy scope***

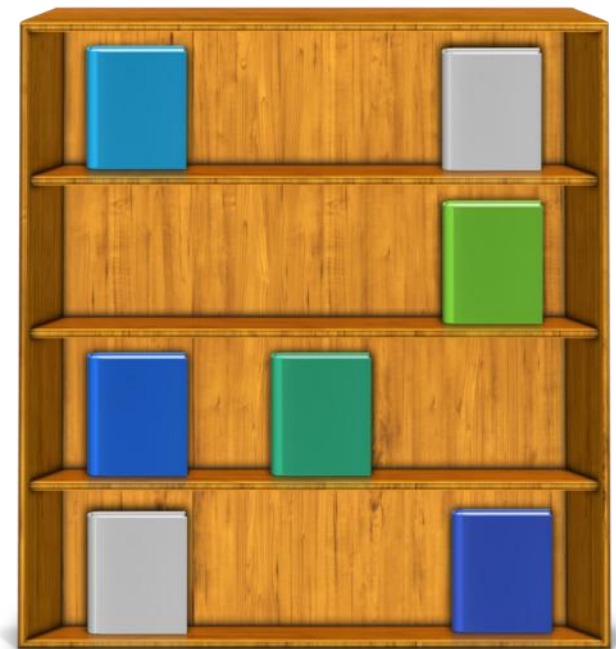
- ❖ 'Governance' should be a policy theme
- ❖ Possibly 'training and human resource development'

Recommendations on the framework conditions for the extraction of non-energy raw materials in the European Union

Ad Hoc Working Group on Exchange of best practices
on minerals policy and legal framework, information
framework, land-use planning and permitting (AHWG)

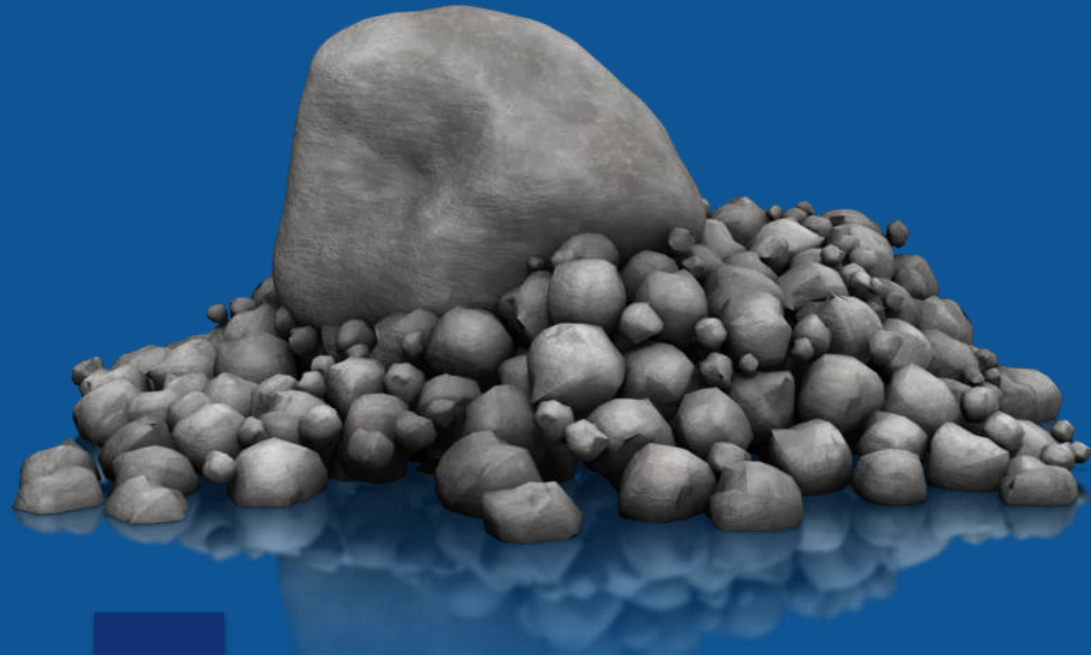
Structure

- Policy and legal framework
- Information framework
- Land use planning
- Permitting



Raw Materials Initiative

III. pillar





Promoting resource efficiency and recycling

Better implementation and smarter EU waste legislation

- Review of waste management targets
- 'Fitness check' of waste stream directives
- Review of Eco-design Directive for energy-related products

Strengthen the enforcement of the Waste Shipment Regulation

- Strengthening inspections through risk-based planning
- Feasibility study of global certification scheme for recycling facilities

European Innovation Partnership on Raw Materials



Strategic Implementation Plan published on 25 September 2013

• I. Technology Pillar

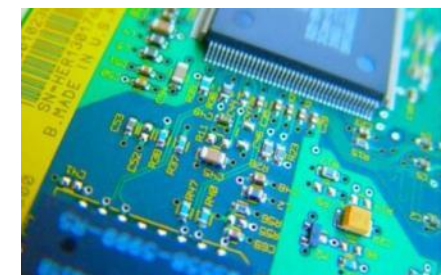
- I.A Raw materials research and innovation coordination
- I.B Technologies for primary and secondary raw materials' production
- I.C Substitution of raw materials

• II. Non-Technology Policy Pillar

- II.A Improving Europe's raw materials framework conditions
- II.B Improving Europe's waste management framework conditions and excellence
- II.C Knowledge, skills and raw materials flows

• III. International Cooperation Pillar

- III.1 Technology
- III.2 Global Raw Materials Governance and Dialogues
- III.3 Health, Safety and Environment
- III.4 Skills, Education and Knowledge
- III.5 Investment activities



Call for Commitments



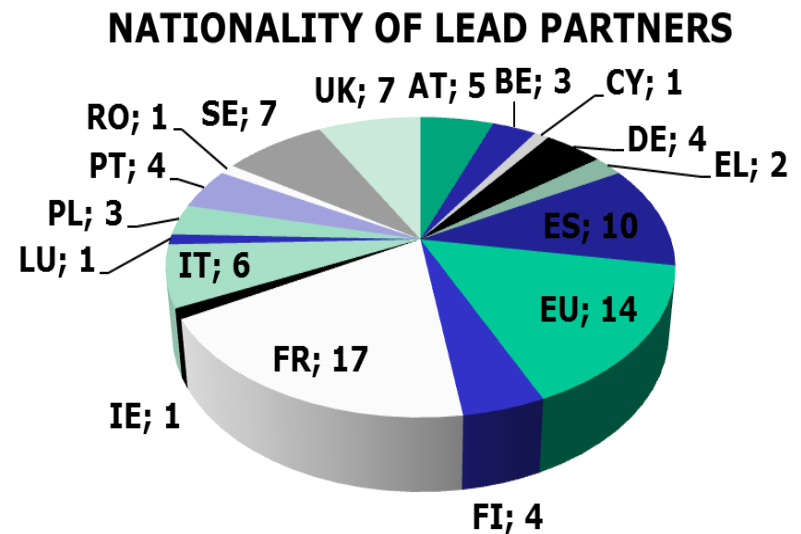
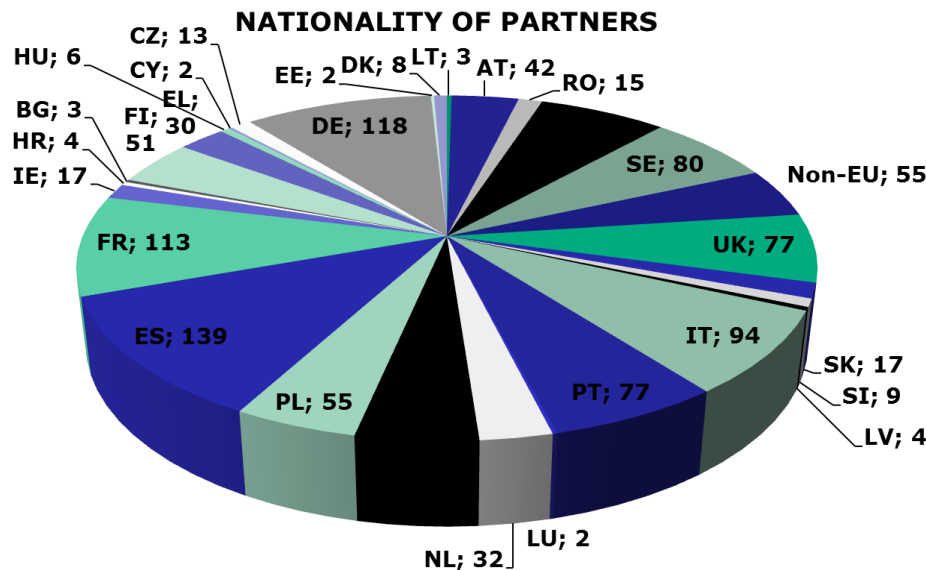
- First **Call for Commitments** launched on 31 October 2013 (closed on 7 February 2014)
- **80** Raw Materials Commitments endorsed
- Approx. **800** partners
- Relative deficit from EU-13 group
- Higher number of **technology** commitments
- Higher number of technology commitments for **primary production** than secondary
- **Scope** of raw materials covered representative (i.e. metals, industrial, forest-based materials)



Call for Commitments



Results of the Call for Commitments: Distribution of partners by nationality



- **Next calls** in 2015, 2017 and 2019

EIP Implementation Progress so far



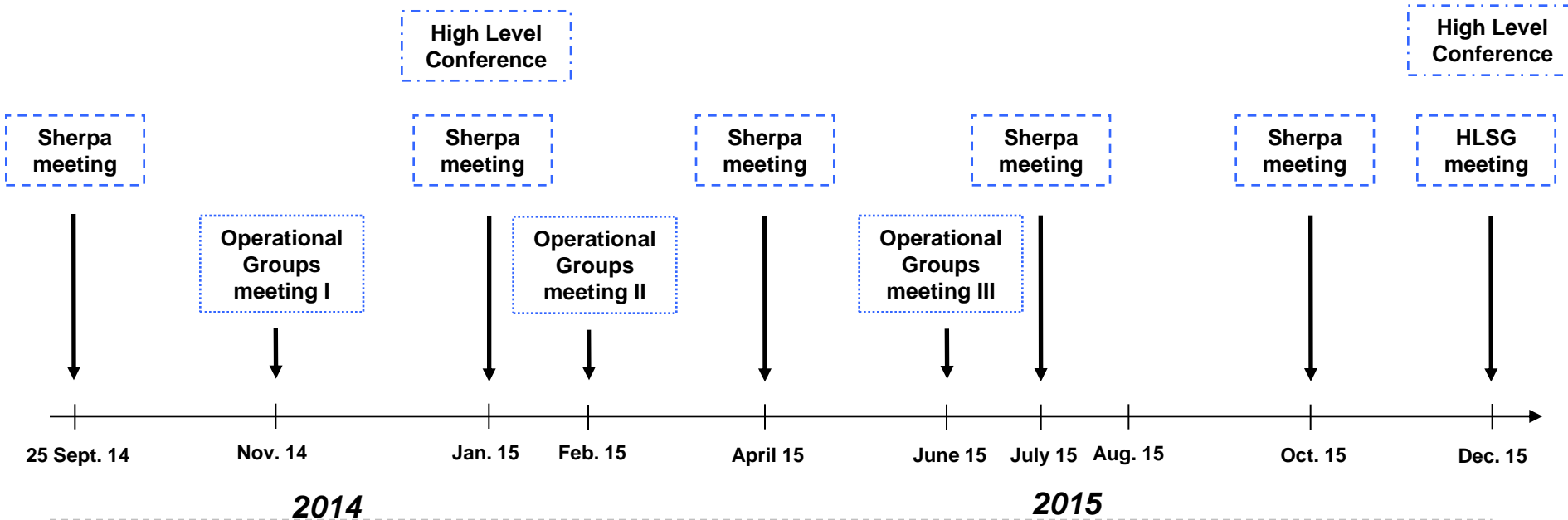
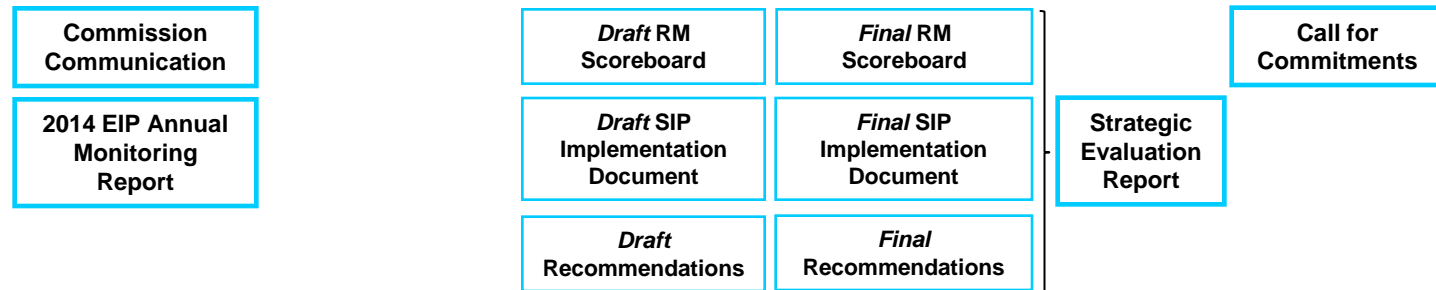
- Annual Conference on 5 December 2013
- First Horizon 2020 Calls
- Review of waste legislation to include ideas from SIP
- Ad-hoc Working Group on Framework Conditions for Mining
 - Report adopted last Thursday
- Identification on regions with raw materials as a priority in their smart specialisation strategy (ongoing)
- EU knowledge base
 - Past, on-going and future studies/projects



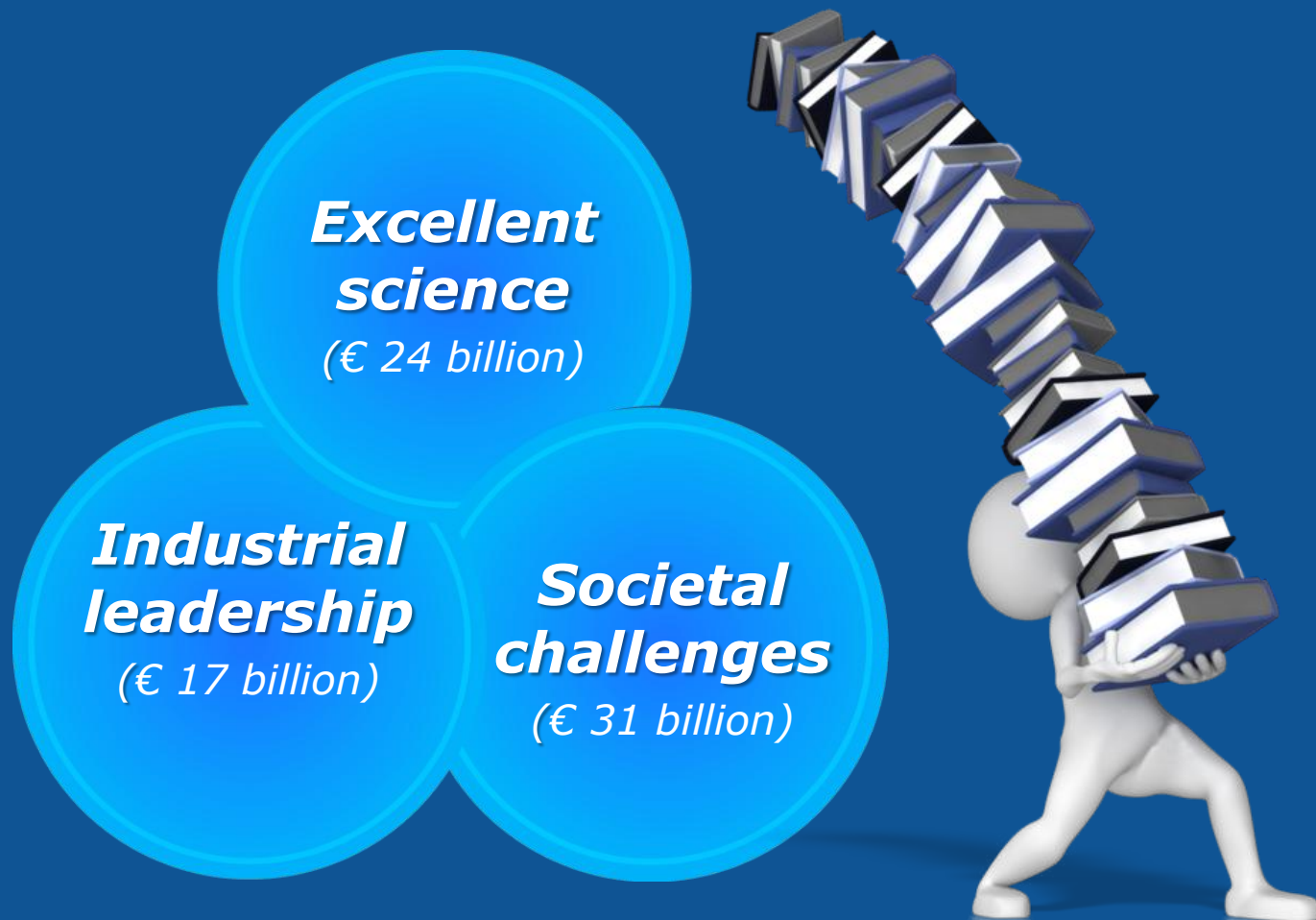
EIP on Raw Materials



2014-2015
Work Plan



Horizon 2020



* All funding figures in this presentation are subject to the pending Multiannual Financial Framework Regulation by the EP and the Council

Proposed Programme Cycle

2014	2015	2016	2017	2018	2019	2020
Strategic Programme						
Work Programme 1 (plus tentative information for 2016)		Strategic Programme				
		Work Programme 2 (plus tentative information for 2018)		Strategic Programme		
				Work Programme 3 (plus tentative information for 2020)		
						Work Programme 4

New solutions for sustainable production of raw materials

- Mining of small deposits and alternative mining (2014)
- Flexible processing technologies (2014)
- Recycling of raw materials from products and buildings (2014)

Innovative and sustainable solutions leading to substitution of raw materials

- Materials for electronic devices (2014)

Coordinating and supporting raw materials research and innovation

- Mineral deposits of public importance (2014)
- Secondary raw materials inventory (2014)
- Strategic international dialogues and co-operation on raw materials with technologically advanced countries (2014)

Raw materials topics

Results 2014



12 selected proposals with over 190 partners from 20 Member States and 8 non-EU countries.

The private sector participation, including SMEs, is around 45% in terms of partners and 49% in funding.

The outreach activities in the EIP should be intensified. Particular attention should be paid to the participation of EU13 Member States, which was weak in both the EIP Commitments and the proposals of H2020.

Negotiation letters sent on 8 September 2014

SC5 11 - New solutions for sustainable production of raw materials - RIA

- New exploration technologies and geomodels (2015)
- Deep mining on continent and in sea-bed (2015)
- New metallurgical systems (2015)

SC5 12 - Innovative and sustainable solutions leading to substitution of raw materials - RIA

- Materials under extreme conditions (2015)

Waste 4 - Towards near-zero waste at European and global level - CSA

- Raw materials partnerships (2015)

SC5 13 - Coordinating and supporting raw materials research and innovation - CSA

- Raw materials intelligence capacity (2015)
- Innovation friendly minerals policy framework (2015)
- Raw materials research and innovation coordination (2015)
- Strategic international dialogues and cooperation with raw materials producing countries and industry (2015)

Cross-challenge topics

- Boosting the potential of small businesses for eco-innovation and a sustainable supply of raw materials (SME Instrument)
- Fast track to innovation

SPIRE 7-2015: Recovery technologies for metals and other minerals - IA

- New approaches or alternative solutions for major cost-effective improvements in the efficiency of recovery operations for metals and other minerals, leading to waste reduction and minimising the environmental impact of industrial operations.
- Innovation actions, TRL 5-7, EUR 6 and 10 million
- One stage 04/02/2015

NMP 23 – 2015: Novel materials by design for substituting critical materials - RIA

- International cooperation, in particular with Japan and the United States of America
- Research and Innovation actions, TRL 3-4, EUR 3 and 5 million
- First stage 26/03/2015, Second stage 08/09/2015



LINKS

EU raw materials webpage:

http://ec.europa.eu/enterprise/policies/raw-materials/index_en.htm

European Innovation Partnership on Raw Materials:

<https://ec.europa.eu/eip/raw-materials/en>

Horizon 2020:

<http://ec.europa.eu/research/horizon2020/>

Thank you for your attention!