



EU Raw Materials Initiative

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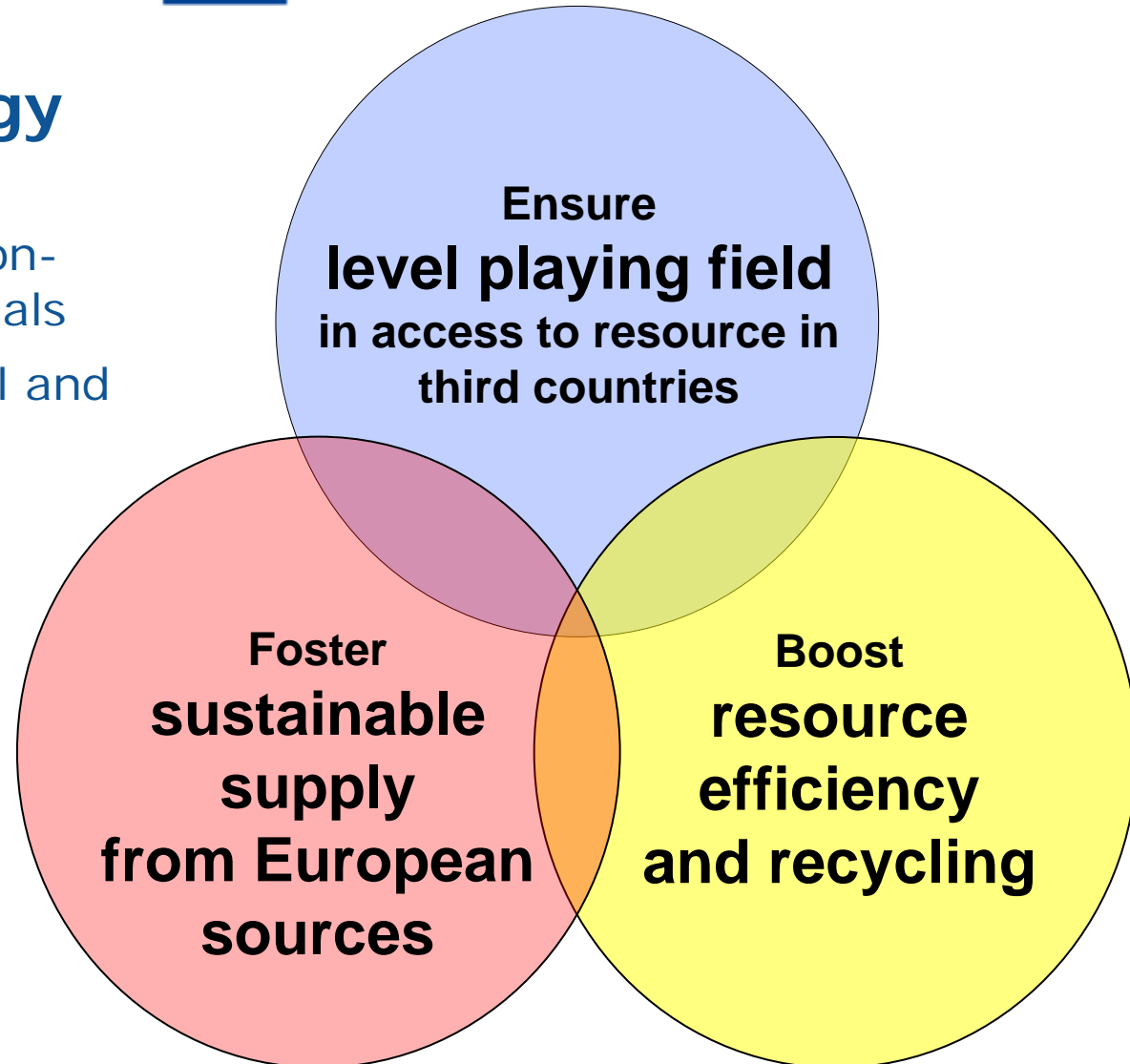
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Integrated strategy

- based on three pillars
- area of non-energy, non-agricultural raw materials
- connecting EU external and internal policies
- launched Nov. 2008
- reinforced Feb. 2011



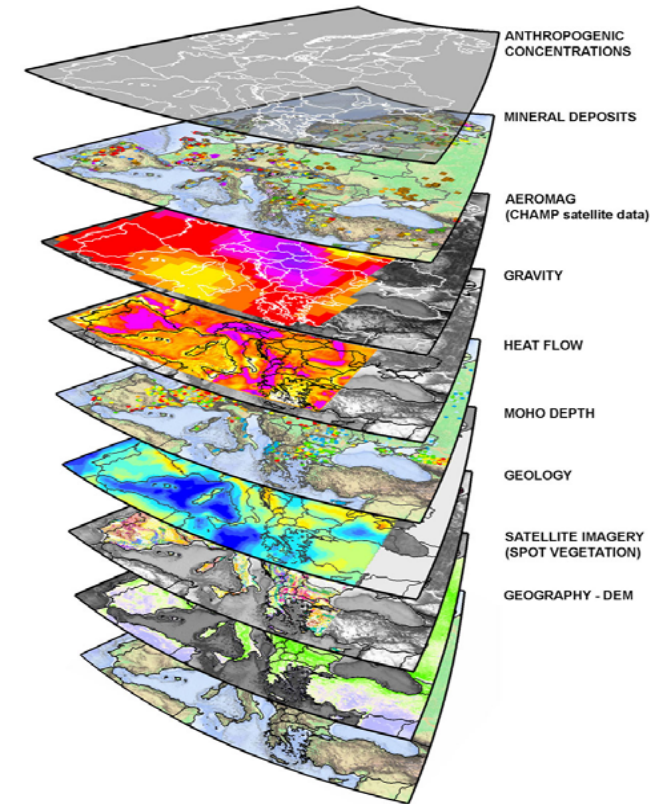
Pillar 2 – fostering sustainable supply within the EU



1. Access to land

2. EU knowledge base

3. Research and development



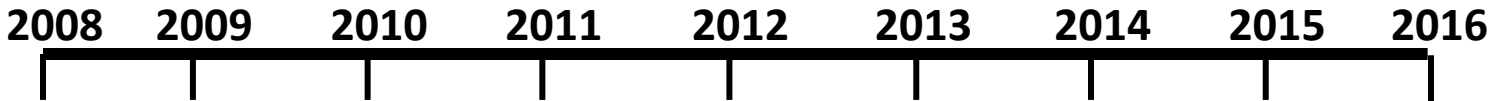


- Promote the exchange of **best practices** in land use planning and administrative conditions for exploration and extraction
- Enhancing the **EU's knowledge base**, e.g. increased cooperation between national geological surveys
- Promote **research and development** in the raw materials **value-chain** including extraction, processing and substitution



With courtesy by Knauf Gips KG

Promote RTD



One Geology Europe

ProMine

ExPerl

ImpactMin

EO-MINERS

EuroGeoSource
Oil - Gas - Minerals

I²Mine

ERA-MIN

“Horizon 2020”
Exploration,
extraction,
processing,
recycling and
substitution

Data capture and
analysis for exploration



Proposal - COM(2012) 82 final - 29 February 2012

Objectives

The overall objective of the EIP on Raw materials is to contribute to the 2020 objectives of the EU Industrial Policy to increase the share of industry on GDP to 20%, to the Innovation Union flagship initiative, and to the Resource Efficiency Policy by ensuring the sustainable supply of raw materials to European economy and society.

This will be achieved by reducing EU **import dependency**, improving **supply conditions from EU and other sources**, providing **resource efficiency**, putting Europe **at the forefront** in raw materials sectors while mitigating negative **environmental and social impacts**

EIP targets 2020



European Innovation
Partnership on raw materials

- Up to **10 innovative pilot actions** e.g. demonstration pilot plants for exploration, mining, processing, collecting and recycling
- **Substitutes for at least 3 applications** of critical raw materials
- **Regulatory framework for primary raw materials**
- **Raw materials network** of Research, Education and Training Centres
- **Raw materials knowledge base** with raw materials flows and trends
- **Enhanced efficiency in material** use and in waste prevention, re-use and recycling,
- **Pro-active international cooperation strategy** of EU at bilateral and multilateral level





•3.1 Technology Pillar

- 3.1.1 Priority Area: Raw materials research coordination
- 3.1.2 Priority Area: Technologies for primary and secondary raw materials production
- 3.1.3 Priority Area: Substitution of raw materials

•3.2 Non-Technology Policy Pillar

- 3.2.1 Priority Area: Improving Europe's raw materials regulatory framework, knowledge base and infrastructure
- 3.2.2 Priority Area: Improving Europe's waste management regulatory framework conditions and excellence
- 3.2.3 Priority Area: Knowledge and skills on raw materials

•3.3 International Cooperation Pillar (WP5)

Disclaimer: *VERSION 1 – DRAFT OF 30/05/2013*

The way forward



- Half 2013
 - ... after summer 2013 HLSG approval of the SIP
- 2nd half of 2013
 - Call for Commitments
 - Monitoring and evaluation schemes
- 2014
 - Communication on SIP
 - SIP implementation to start



National Minerals Policy Indicators



Indicators to be developed in order to establish a monitoring mechanism for assessing Member States actions in the following areas:

1. Minerals policies

2. Land use planning policies

3. Authorisation and permitting procedures



Raw Materials Initiative – second pillar

Set the right framework conditions within the EU in order to foster sustainable supply of raw materials from European sources

Indicator groups

Legal framework

Information framework

Land use planning

Authorisation and permitting

- **Legal framework indicators:**
 - Mineral Acts
 - Incentives for exploration foreseen in the fiscal framework
 - Long term planning legal framework to ensure access to mineral reserve and resources
- **Information framework:**
 - Availability of reliable statistics on raw materials supply and demand
 - Detailed geo-scientific knowledge basis

- **Land use planning:**

- Digital geological knowledge basis
- Suitable maps

- **Authorisation and permitting:**

- Average time frame for granting authorisation
- Number of complete permits delivered over a certain period of time, compared to the number of applications



Indicators questionnaire

Questionnaire campaign through RMSG
EU 27 and 10 more countries

Replies

18 Member States, Norway and Turkey
Some replies on regional level
Four replies from industry



Interpretation of results

Definition of desired answers;

3 reply classes: **to be improved**
satisfying
good

Overall evaluation gives equal weight to all indicator groups

Only Member States' replies were evaluated and ranked.



- Lot of information collected; replies in some cases not sufficient or satisfactory
- Collected information is a solid ground for further in-depth inquiries
 - Legal framework needs more information
 - Level of centralization within land use planning
 - Permitting is complex procedure
- Evaluation (desired/undesired state of the world)



- The state of the world is recognizable
- Trends can be foreseen

- Indicators are at early stage, modifications are needed
- Second data collection should be carried out

References



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THANK YOU!