



INDUSTRIAL MINERALS ASSOCIATION EUROPE

Annual Report 2008-2009

Industrial Minerals - Your world is made of them



A Year at a Glance

The period was marked by the conjunction of a worldwide unexpected economic crisis, particular focus of the European Union policy on mineral resources, but also the implementation of the new Chemicals Policy (both REACH and the CLP regulations) and of the Mining Waste Directive, while the revision of other major pieces of legislation (e.g. the Integrated Pollution Prevention and Control, IPPC and the Emission Trading Scheme, ETS) was discussed. The sustained regulatory activity was particularly demanding in data collection, coordination with various stakeholders, sharing of industry experiences. This forced the IMA Secretariat to quickly put into place procedures to deal with confidential information, multiplied the number of meetings and increased the need for external legal and technical advice.

These challenging circumstances deserved industry's serious attention and forced us to define strict priorities in order to cope with the increased workload. One of the key priorities defined by the IMA Board was the Secretariat's role in assisting The Industrial Mineral sector to comply with the REACH regulation in order to benefit from the leadership gained during the REACH decision making process thanks to our knowledge of Industrial Minerals. To this end, IMA-Europe set up five REACH consortia. The management of these consortia which group together IMA members and non-members entailed the hiring by two consortia of temporary advisors to reinforce our resources. The classification of industrial minerals according to the criteria of the new Classification, Labelling and Packaging Regulation rose intensive reflections since, as it was already the case beginning of the 90's when we submitted the so-called "HEDSETS" to comply with the Existing Chemicals Regulation, the debate led to highlight differences between chemicals and minerals not necessarily properly addressed in the legislation (e.g. physical form). This is particularly true regarding the preparation of respirable crystalline silica notification in the coming classification and labelling inventory of the European Chemicals Agency (ECHA).

It is noteworthy that at the same time under the leadership of Vice-President Verheugen, the European Commission adopted in November 2008 a Communication on "The Raw Materials Initiative - Meeting our critical needs for growth and jobs in Europe" which puts emphasis on the security of access to primary and secondary non-energy raw materials produced in Europe or imported from abroad. As a result, DG Enterprise set up two expert working groups (WG) to which IMA-Europe appointed experts. And which aim respectively at defining Critical raw materials and Best practices exchange on land use planning, permitting and minerals knowledge. Within the same context, DG Environment decided to prepare a guidance document to clarify how extraction activities in or near Natura 2000 areas can in principle be reconciled with environmental protection. Committed to obtaining the best from these opportunities, the IMA Secretariat with the support of IMA member experts, actively contributes to the multiple aspects of the initiative. As a proof of IMA's appraised involvement, one should outline that Commissioner Verheugen opened the inaugural event of the 2009 Minerals Day in Prague acknowledging the essential role of minerals to the EU economy.

Finally it must be emphasised that mostly all European extractive industry representations joined the Minerals Day and this contributed to the success of the initiative launched in 2007 by IMA-Europe and the visibility of the extractive sector.

All these achievements were possible thanks to the support of our member company Chief Executives and experts and our dedicated team and we would like to thank you all for this. The coming two years will still require sustained efforts to finalise these various files and to make the 2010 Social Dialogue Agreement on Crystalline Silica a success. The coming months will also see the installation of a new Commission and a new Parliament and this will prompt us to establish new contacts in order to enhance the credit of the Industrial Minerals industry vis-à-vis the Institutions. We are confident in taking up these these coming challenges together.

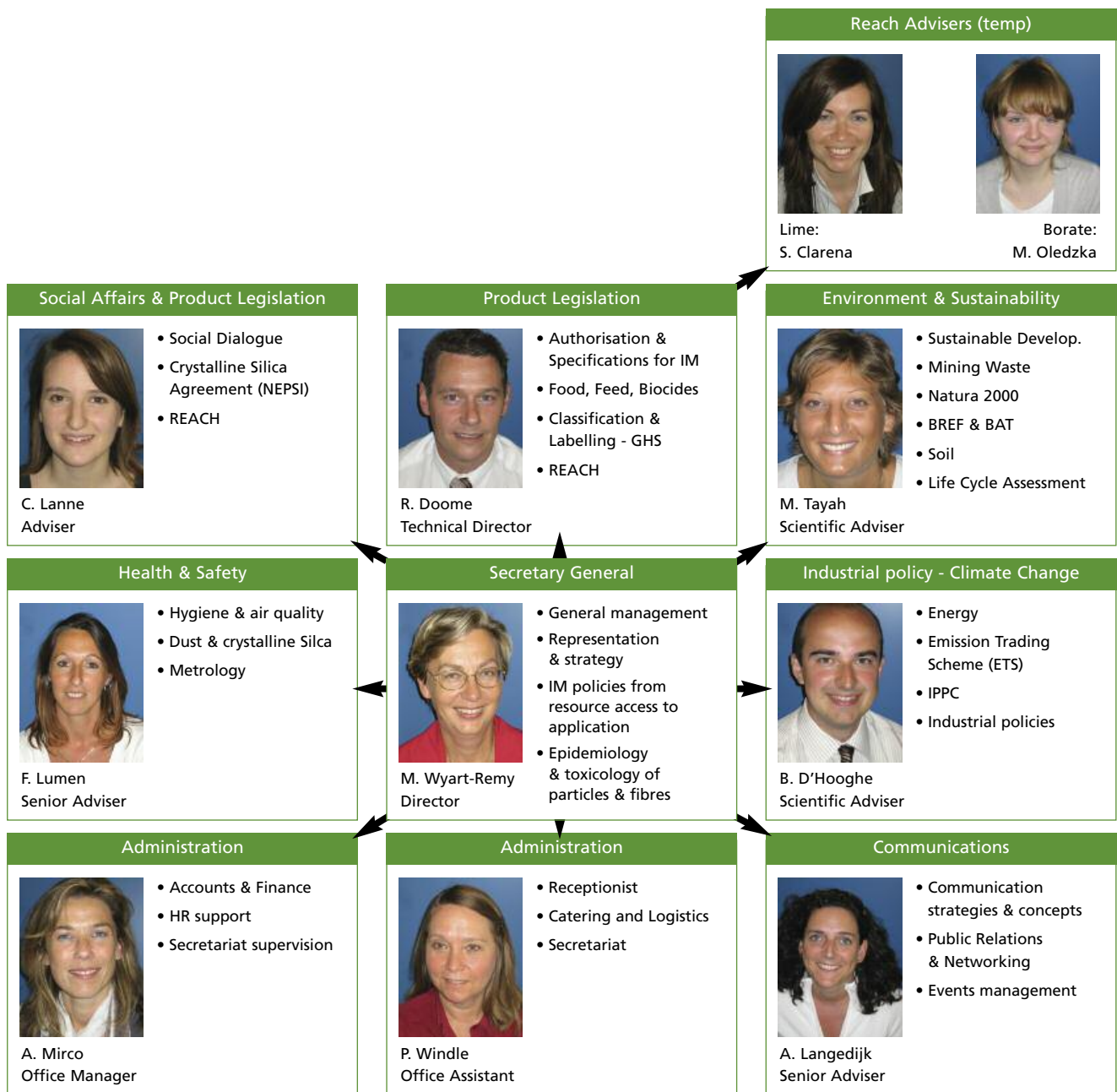


Thierry Salmona
President



Michelle Wyart-Remy
Secretary-General

IMA Staff & Responsibilities



Reach Advisers (temp)



Lime:
S. Clarena



Borate:
M. Oledzka

Social Affairs & Product Legislation



- Social Dialogue
- Crystalline Silica Agreement (NEPSI)
- REACH

C. Lanne
Adviser

Product Legislation



- Authorisation & Specifications for IM
- Food, Feed, Biocides
- Classification & Labelling - GHS
- REACH

R. Doome
Technical Director

Environment & Sustainability



- Sustainable Develop.
- Mining Waste
- Natura 2000
- BREF & BAT
- Soil
- Life Cycle Assessment

M. Tayah
Scientific Adviser


Health & Safety



- Hygiene & air quality
- Dust & crystalline Silca
- Metrology

F. Lumen
Senior Adviser


Secretary General



- General management
- Representation & strategy
- IM policies from resource access to application
- Epidemiology & toxicology of particles & fibres

M. Wyart-Remy
Director

Industrial policy - Climate Change



- Energy
- Emission Trading Scheme (ETS)
- IPPC
- Industrial policies

B. D'Hooghe
Scientific Adviser

Administration



- Accounts & Finance
- HR support
- Secretariat supervision

A. Mirco
Office Manager

Administration



- Receptionist
- Catering and Logistics
- Secretariat

P. Windle
Office Assistant

Communications



- Communication strategies & concepts
- Public Relations & Networking
- Events management

A. Langedijk
Senior Adviser

European Minerals Day Launch Event, Czech Republic - 14th May 2009



Fig 1 - Mr Hrozek (HeidelbergCement), Mr J. Sroubek (Lhoist), MEP M. Ouzky and Mr J. Mil (Confed. Czech Industry)



Fig 2 - Mrs M. Wyart-Remy, Mr P. André and MEP Ouzky



Fig 3 - Mr Huner (Deputy Minister for Industry & Trade), Mr Salmona and EC Vice-President G. Verheugen



Fig 4 - Messrs Sroubek (Lhoist) and Hrozek (HeidelbergCement) hosts of the EMD Launch Event



Fig 5 - quarry visit and presentation bird island project



Fig 6 - Mr S. Winkler (Countdown 2010), T. Salmona, P. André (CEO Lhoist).

IMA-Europe 2008 Conference & Award Ceremony



Fig 7 - Mrs C. Smith (moderator) & Mr C. Stenneler (IMA President 06-08)



Fig 8 - Speakers: Messrs E. Turner(RTM), D. Herbert (DG ENTR) and W. Bosman (DG ENV)



Fig 9 - Mr A. Carvalho (DG ENTR).

Signature Ceremony - Partnership with Countdown 2010 & IMA 2008 Recognition Award



Fig 1 - Signature of the Countdown 2010 Declaration by Mr Stenneler and Mr Winkler (Head of Countdown 2010)



Fig 2 - Gala Dinner & IMA 2008 Recognition Award Ceremony where Mr Stenneler presents the IMA Award to Dr Wilhelm for the LVR (Fig 3).



European Minerals Day

170 plants in 27 countries > 30.000 visitors

14-17 May 2009



France



The Netherlands



Germany



Germany



Czech Republic



Austria



Greece



Slovenia



Finland



Belgium



Turkey



Italy



The European Minerals Day 2009 welcomed approximately 30,000 visitors at more than 170 sites in 27 countries (22 in Europe and 5 outside Europe).

The European Minerals Day celebrated its second edition on May 15-17, 2009. Despite the economic crisis, this year's event was even more successful than the first edition in May 2007. Several factors contributed to its success.

First of all, the **recognition and support by the European Commission**, who mentioned The European Minerals Day in its communication 'The Raw Materials Initiative - Meeting our critical needs for growth and jobs in Europe' (COM 2008/669) 4 November 2008.



"...there is still limited **public awareness** of the importance of domestic raw materials for the European economy. More effective partnerships between universities, geological surveys and industry should be encouraged to address these challenges. The Commission will encourage initiatives such as the European Minerals Day 2009... ." .

Moreover, EU Commission Vice-President Günter Verheugen, Commissioner for Enterprise and Industry, inaugurated the EMD 2009 at its Launch Event in Prague, Czech Republic which was also attended by Czech MEP M. Ouzky, Chairman of the EP Environment Committee, the Czech Deputy Ministers for Industry and the Environment, Mr J. Mil, the President of the Confederation of Czech Industry, and Mr S. Winkler, Head of Countdown 2010. In addition, both the Directorates for Enterprise & Industry and for Environment lent their support to the press conference organised in Brussels on 13 May.

Secondly, the **wide partnership** and support within the minerals sector and by its stakeholders: In 2009, we joined forces with the European aggregates sector (**UEPG**), the European cement producers (**CEMBUREAU**) and the European Association of Geological Surveys (**EuroGeoSurveys**). Furthermore, the Countdown 2010 Secretariat (**IUCN**), the European Landowners Organisation (**ELO**), the trade union (**EMCEF**) and media partner EurActiv.com and EurActiv.cz gave their active support.

Thirdly, the link we established between the European Minerals Day 2009 and two EU policies: the Raw Materials Initiative and Biodiversity Protection. The contribution of the minerals sector to biodiversity has not been communicated much about, as it is part of the good environmental management of the sites. However, the timing to communicate about it seemed appropriate, as confirmed by Sebastian Winkler, Head of Countdown 2010 at the European Launch Event who welcomed industry's initiative by saying: "Your contribution to biodiversity is something you can be proud of and should capitalise on through events such as this one". The EU Partners therefore collected and published representative biodiversity case studies on the Minerals Day website. At local level, companies proudly presented their case studies to the public, and made it the subject of multiple school projects.

With a limited budget, the European Associations focussed their resources on a professional media campaign and a performing website (www.mineralsday.eu), but most of all, on an aligned and strong message. Following the successful partnership on the EMD 2009, the EU partners foresee further joint initiatives throughout 2010-2011 to maintain the momentum.



Respirable crystalline silica



Updated scientific evaluation and EU regulatory developments at workplace and classification level

The last year was very busy in regulatory developments concerning crystalline silica and the coming year promises to be even more active and important.

It started in July 2008 when the European Commission launched a call for tender for a contract on the analysis at EU level of health, socio-economic and environmental aspects in connection with possible amendments to Directive 2004/37/EC - carcinogens at work.

To our regret, respirable crystalline silica (RCS) was mentioned for possible inclusion in the revised Directive, together with 23 other substances. The impact study will be carried out by a consortium led by the Institute of Occupational Medicine (IOM) of Edinburgh and should be completed by the end of June 2010. The contractor will ask information from industry on the number of exposed workers, levels of exposure and socio-economic data. All concerned industry sectors including NEPSI signatories are committed to collecting and providing the necessary information to the contractor in order to ensure a good quality study.

By coincidence, the impact assessment will be finalised at the exact time the next NEPSI report is due, i.e. in June 2010. It is therefore expected that the Commission will carefully scrutinise the NEPSI 2010 report in order to decide if further regulation is required or not, and to determine whether crystalline silica should be amongst the substances which should be regulated by priority in the revised Carcinogens Directive.

We believe it is therefore more than ever essential to demonstrate that the European Social Dialogue "Agreement (SDA) on Workers' Health Protection through the Good Handling and Use of Crystalline Silica and Products Containing It" is an effective and reliable solution for workers' protection to RCS exposure.

Several meetings of the NEPSI employers and of the NEPSI reporting task force were organised along the year to prepare the 2010 Report, identify priority areas for improvement and update the reporting system. It was also decided to launch an awareness campaign enhancing the achievements of the Agreement via promotional tools, seminars, and a final conference in September 2010 in the presence of the new EU Commissioner for Employment. The IMA secretariat was in charge of preparing and submitting the call for EC funds for these various actions.

On 17 June 2009, the NEPSI Council met and welcomed a new member, the Expanded Clay Association – EXCA – which became the 15th sector to sign the Agreement. At this meeting, the Associations representing the Employers satisfied the request of the Employees to provide them with national reports of the 2008 results and the NEPSI 2008 Summary Report was officially approved.

On the Classification side, the end of 2008 saw the publication, on 16 December, of a new Regulation on the Classification, labelling and packaging of substances and mixtures, amending and repealing Directives 67/548/EEC and 1999/45/EC. The so-called CLP Regulation applies in Europe the general principles of the UN GHS, the Globally Harmonised System of Classification and Labelling of Chemicals.

Title V of the CLP Regulation (taking over the provisions of the REACH Regulation Title XI) requires that by 1 December 2010 dangerous substances placed on the market are notified to the classification and labelling inventory of the European Chemicals Agency.

This notification concerns crystalline silica because, although there is no classification of crystalline silica under the European dangerous substances regulations, it is current practice to label silica flours as harmful with Xn R48/20.

By December 2010, any importer of crystalline silica or a substance containing crystalline silica will be in a position to notify a classification. It is considered very important that industry takes a common and a credible approach for the classification; otherwise the European Commission may ask for a harmonized classification or, if it fails to happen, open the classification dossier.

Respirable crystalline silica - continued

Through EUROSIL, silica producers took the issue very seriously and commissioned an updated review and hazard assessment of (respirable) crystalline silica to a team of renowned epidemiologists and toxicologists. Several other IMA Sections contributed to this study which should be finished in autumn 2009.

In the meantime, the IMA RCS working group met several times to discuss the issue, examine the possible classification scenarios and their consequences. It is a complex and delicate dossier and the coming year will be crucial. The objective is to come to a common IMA recommendation of classification of respirable crystalline silica by end of 2009 in order to leave time to companies to prepare labels and update their safety data sheets before the deadline of December 2010.

For minerals containing crystalline silica, producers have two options: either use the concentration rules for mixtures and so apply the classification recommendation for respirable crystalline silica, or conduct the hazard assessment of their mineral and base the classification decision on the outcome. Almost all IMA sections have launched an updated "Environmental Health & Safety (EHS) database" to address these notification requirements.

Scientific developments

On the scientific front, the first quarter of the 2009 was busy with the IARC re-evaluation of substances. Indeed, for its 100th Monograph's celebration, the Agency reviews this year all human carcinogens previously evaluated. During the week 17 to 24 March 2009, Meeting C "Metals, Particles and Fibres" was held and a Working Group reviewed 14 agents, including talc containing asbestiform fibres and crystalline silica.

EUROSIL/EUROTALC and their homologues in IMA-North America appointed two observers to participate in the meeting: Dr. P. Morfeld (epidemiologist) and Dr. G. Öberdorster (toxicologist, expert in fibres and particles) to contribute to the debate.

It will probably take between two to five years before the publication of the Monograph. However, conclusions were published in the Lancet Oncology on 4 May 2009:

For crystalline silica, the Lancet article mentions "The Working Group reaffirmed the carcinogenicity of crystalline silica dust as Group 1. An increased risk of lung cancer was observed across various industries and processes". There is nothing new in this conclusion compared to the 1997 Monograph except that it introduces the word "dust" instead of "inhaled" and "from occupational sources", reinforcing the idea that health effects are limited to the workplace as it is the case with flour dust, rubber fume, or diesel exhaust.

The coming year will see the outcome of industry's efforts at all fronts: on the occupational level with the crucial NEPSI 2010 Report and the impact assessment of the revision of the Carcinogens Directive, on the classification side with an agreed notification in the ECHA inventory, and also in sciences, since one of the largest epidemiological studies to date addressing silica, silicosis and cancer in a cohort of 20 000 German porcelain workers will be published.



The second semester of 2008 marked the real kick-off of the new EU Chemical Policy REACH with the pre-registration duty which totalled about 2.6 Mio pre-registrations for about 150,000 chemical substances. In this exercise, IMA-Europe has coordinated the pre-registration for the industrial minerals that either need to be registered or show an unclear status towards registration.

In January 2009, the European Chemical Agency (ECHA) released the list of all the pre-registered substances. It appeared soon that all industrial minerals have been pre-registered even those which were clearly exempted from the obligation to register. Consequently, all IMA Sections decided to take the lead of the respective pre-SIEF s and initiated adequate actions. For the pre-registered natural minerals not chemical modified, IMA-Europe released thousands of letters to remind the pre-registrants that the substance is exempted from registration and thus a registration dossier shall not be submitted to ECHA. With regard to the calcined minerals, IMA's Sections organised Pre-SIEF meetings to discuss the sameness of the substances and explain to the non IMA members the IMA-Europe position on calcined minerals. The outcome of these meetings was successful and all the non IMA members endorsed our position on calcined minerals which claims that calcined minerals are not chemically modified natural minerals and thus are exempted from registration.

In the meantime, IMA-Europe's Sections have set-up six consortia for the substances or groups of substances that need to be registered by 1 December 2010. These consortia cover lime substances, borate substances, calcium sulfate, bentonite acid-leached, soda-ash flux calcined kieselguhr and synthetic calcium carbonate. For all these substances, except for calcium sulfate, IMA-Europe has been appointed as coordinator of the Consortia and IMA-Europe or its relevant section has been appointed as SIEF facilitator. In the case of calcium sulphate, Eurogypsum was appointed as Coordinator of the Consortium while Saint-Gobain Gypsum volunteered to act as SIEF Facilitator and Lead Registrant. The objective of the consortia is to prepare and submit the joint registration dossier in due time. Another consortium is being set up for zinc borate on the initiative of the European Borates Association (EBA).

On legislative aspects, the European Commission together with the National Competent Authorities have reviewed Annexes IV and V (exemptions from registration, evaluation and downstream uses), Annex XI (rules for adapting the testing regimes) and Annex XVII (Restrictions on the manufacture, placing on the market and use of certain dangerous substances, mixtures and articles). Thanks to its observer seat in the Commission's REACH WG on Annexes, IMA-Europe in partnership with its colleagues from the REACH Alliance has ensured that these Annexes were reviewed without impacting industrial minerals. In particular, the exemption granted to natural minerals not chemically modified has been maintained unaltered as expected by IMA-Europe's members. In parallel to this legislative process, ECHA is working on a Guidance Document on Annex V. The objective of this Guidance is to develop a common understanding of the exemptions listed in Annex V. IMA-Europe and the REACH Alliance are actively involved in the development of this Guidance in order not to have a prescriptive application of the exemption granted to minerals. The issue at stake is to determine whether the two conditions "mineral occurring in nature, if not chemically modified" is to be cumulative or consecutive. Industry's position is that these two conditions are to be considered consecutive and not cumulative. The final ECHA Guidance on Annex V should be released end 2009.

The EC has also worked towards the revision of a number of other Annexes of the REACH Regulation (Annex I (Assessing substances and preparing CSR), II (Guide to the compilation of safety data sheets), XIII (Criteria for PBT and vPvB) and XV (Dossiers)). The work is still in progress and is expected to be finalised end 2009.

Lastly, the legislative debate has focused on the nano-forms of substances for which there is no specific requirement in the REACH Regulation. The European Parliament echoed by many NGOs and Member States has called the EC to issue a legislative proposal to address the safety of nano-materials. As a response, a Commission WG was set up in 2008 to investigate the best approach to cover the specificity of the intentionally manufactured nanomaterials under REACH. IMA-Europe has obtained an observer seat in this working group in order to feed the discussion with the necessary inputs to achieve a balanced legislative proposal on nanomaterials which is not expected before the end of 2010.

² SIEF: Substance Information Exchange Forum

EU Emission Trading Scheme (EU ETS): Preparing for the 3rd period



In 2008 and 2009 the revision of the EU ETS Directive in view of the 3rd trading period (2013-2020) was very high on the agenda of IMA-Europe, and, in particular of EuLA, the European Lime Association. The IMA-Europe Board fully supports these activities and the development of a specific competence on ETS within IMA-Europe. This knowledge may well serve in other fields such as the revision of the Taxation of Energy Products Directive.

A new Directive - EuLA was involved in the revision of the EU ETS since the very start. The whole co-decision process has been closely monitored with the help of Avisa Partners – a Brussels-based public affairs consultancy; and several proposals have been made to amend the different versions of the new Directive proposed by respectively the Commission, the European Parliament and the Council. While doing this, EuLA strived to an as broad as possible industry coalition, working closely together with other sector federations in the “Alliance of Energy Intensive Industries” or in partnership with BusinessEurope.

EuLA also met and discussed the issues of concern to the sector with several decision makers. The most influential Members of the European Parliament - such as Ms. Avril Doyle, the Parliament rapporteur – and high-level representatives of both the French and Czech EU presidency have been met and EuLA's concerns were explained.

The new EU ETS Directive was published in the Official Journal on 5 June 2009. Nonetheless, some key issues still remain open, such as a decision on the list of sectors at risk of carbon leakage and on the allocation methods (benchmarking). The EU Member States play a very important role in the decisions on these open issues. Hence, the EuLA Members are actively contacting their national administrations, and experiences are shared at European level.

Carbon Leakage or the impact of the ETS on the EU industry competitiveness - NERA - a British economic consultant – evaluated the risk of carbon leakage for the lime sector. This study was further refined and extended in 2009. The EuLA members provided NERA with data to assess the risk of carbon leakage through geographical modeling on a kiln-by-kiln basis of EU and non-EU supply. The NERA model clearly quantifies the amount of carbon leakage for several carbon prices, and concludes that although trade may be low at the moment, it could dramatically rise if costs for producing in the EU would increase.

The lime sector is at risk of carbon leakage - EuLA together with Ciba - an independent consultant - has calculated the “additional costs induced by the implementation of the new ETS Directive, as a proportion of the gross value added (GVA)” and got a result that was considerably higher than the provisional Commission estimate. The latter was reconsidered, and a consensus emerged on a total carbon intensity value of 85.9%, which is much higher than the required 30%. This result clearly shows that the lime sector is particularly affected by the ETS Directive. A final list with the sectors at high risk of carbon leakage will be approved toward the end of 2009.

Free allowances amount to 100% of a benchmark value in case of carbon leakage - EuLA asked Ciba to develop a benchmark model. The lime industry was one of the very first sectors to be able to present some concrete benchmarks. A data survey was organised among the EuLA members to obtain information on their CO₂ emissions and fuel mix. The benchmark model was updated in 2009 to make it compliant with the revised Directive and to obtain the latest figures from the EuLA members.

Not clear yet what benchmark will be assigned to the lime sector - Ecofys, a Dutch consultant, is investigating the different sectors at risk of carbon leakage on behalf of the Commission, and will propose some practical benchmarks. EuLA is in contact with the Ecofys consultants, who are aware of the main concerns of the lime sector. In June 2009, Ecofys made a paper available explaining their general approach to benchmarking, as well as a more detailed study on the lime sector. The latter did not yet propose any benchmark though. EuLA has provided the consultants with several comments. (See Factsheet on the ETS – paragraph “Sector action”). A Commission proposal for a benchmark should be available in Spring 2010 and should officially be adopted in December 2010.



Guidance document on Natura 2000 and the NEEI

The main environmental issue of the past year has been the drafting of guidelines on “Natura 2000 and the Non Energy Extractive Industry (NEEI)”. Indeed, following industry complaints on the difficulties to access land for the extraction of raw materials in and around Natura 2000 areas, the European Commission came with the initiative to develop guidelines aiming at **clarifying how extraction activities in or near Natura 2000 areas can be reconciled with environmental protection**.

The Commission appointed a consultant to develop the guidelines and a Working Group (WG) composed of the various stakeholders has been set up to discuss and provide input on the matter. The Secretariat and two IMA experts took part in the WG and the developments of the guidelines were closely followed by the IMA Mining Environment WG and the IMA Technical Board who provided constructive inputs and comments on the various working drafts that were circulated. IMA-Europe and its NEEI Panel (NEEIP) colleagues succeeded in having the guidelines recognise the sector’s specificities and the positive contribution that NEEI activities can have on biodiversity conservation. However, as a number of important issues have not been properly addressed, IMA-Europe and its NEEIP colleagues decided to take things to a higher level and addressed a common letter to Commissioners Dimas (Environment) and Verheugen (Enterprise) asking for their support. A meeting with both Commissioners’ Cabinets is foreseen in September in an attempt to resolve the remaining pending issues.

Soil Framework Directive

The IMA Mining Environment WG has also closely followed the developments within the Council of the Commission proposal for a Soil Framework Directive. IMA-Europe and its NEEIP colleagues addressed the Council’s permanent representatives requesting that extractive and IPPC activities be removed from Annex II on potentially soil polluting activities. The rationale given was that any EU approach to soil remediation should be risk-based and not activity based and that a legislative overlap should be avoided. To date, the Environment Council failed to reach a political agreement on the matter and the dossier shall be put back on the Council’s agenda during the Spanish Presidency in January 2010.

Mining Waste Directive

The Mining Waste Directive’s Comitology procedure has officially ended in May 2009 with the publication in the Official Journal of the Directive’s implementing measures. The standardisation work is on the other hand still ongoing. After being put on standby for more than a year due to lack of funding, the CEN TC 292 WG 8 was convened in January 2009 for a “pre kick-off meeting” re-launching the work previously started. A consortium formed by WG8 experts were assigned to carry out this task. The two most relevant items for our sector are the General Guidelines for the characterisation of waste from the extractive industry and the technical report on sampling. IMA-Europe has observer seats in the consortium and is invited to provide input to the experts. The documents are expected to be finalised in approximately 2 years.

The Secretariat has followed up on the transposition of the Directive in the different EU Member States, an issue that will be one of the main points of discussion of the September IM Forum.

Directive on Industrial Emissions (IPPC)

Within IMA-Europe, an IPPC Working Group has been created to follow-up the revision of the IPPC Directive, which will now be part of a new Directive on Industrial Emissions. The revision touches upon several elements such as: the setting of the Emission Limit Values in the national permits, soil policy, reporting to the national competent authority, inspections, information to the public, and the review of the permit conditions. In its First Reading Report of 10 March 2009 the European Parliament proposed the introduction of a "European Safety Net" (ESN). The Council did not support this proposal though in its political agreement of 25 June 2009. On its turn the Council introduces a comitology procedure for adopting the BREF conclusions.

An issue of particular importance for IMA-Europe members is the potential extension of the scope of the IPPC Directive to combustion installations with a thermal rated input between 20 MW and 50 MW. Commission and Parliament are in favour; while the Council is against.

A Second Reading in both Parliament and Council is expected in the second half of 2009 and should be finalised towards Spring 2010. IMA-Europe is closely monitoring these activities together with BusinessEurope and the IPPC Alliance (which gathers the federations representing the sectors covered by the IPPC).

Potential introduction of a NO_x – SO₂ Emission Trading Scheme

Entec – a consultant working for the Commission - started in 2008 with the assessment of the possibility of developing a EU-wide NO_x and SO₂ trading scheme for IPPC installations. Although none of the IMA-Europe sectors are being examined, a potential NO_x – SO₂ Emissions Trading Scheme could cover all emitters. The study should be finalised towards the end of 2009.

Biodiversity & IMA-Europe's commitment to Countdown 2010

As part of its commitment to the Countdown 2010 initiative, IMA-Europe published a Biodiversity Statement in December 2008 and started collecting good biodiversity case studies, some of which have been published on the European Minerals Day website. Biodiversity was chosen as a key theme of the EMD 2009, which was much welcomed by DG Environment and the Countdown 2010 Secretariat. Several member companies have signed the Countdown 2010 Declaration directly when launching new projects related to biodiversity. IMA-Europe foresees further initiatives in the sector in 2010, the International Year of Biodiversity, amongst others in collaboration with its EMD 2009 partners (see also Issue Fact Sheet on Biodiversity & Countdown 2010).



Sectoral Social Dialogue Committee for the Extractive Industries (SSDCEI) and the Accidents at Work Project

Since 2003, IMA-Europe is a member of the Sectoral Social Dialogue Committee for the Extractive Industries (SSDCEI), together with EMCEF (European Mine, Chemical and Energy Workers' Federation), APEP (European Association of Potash Producers), EURACOAL (European Association for Coal and Lignite), EUROMINES (European Association of Mining Industries), and recently UEPG (European Aggregates Association). IMA-Europe chaired the Committee in 2008 and the rotating Presidency went to EMCEF in 2009, with the IMA President having the Vice-President seat. Therefore, the SSDCEI Secretariat is not anymore an IMA-Europe duty in 2009, however our commitment to guarantee the achievement of the work programme we contributed to launch is obviously still there.

In 2007, the Members of the SSDCEI expressed concern after a comparative analysis of accidents statistics in a number of countries. The extractive industry social partners then decided launch and coordinate a European project on **"Recognising trends in accidents causes and promoting relevant guidelines and best practices"** to be carried out in 2008 and 2009.

The aim is to identify the causes of accidents in some countries (i.e. Bulgaria, Hungary, Poland, Germany and Sweden) and to provide guidance, especially to young workers (i.e. recently hired) and subcontractors who have been identified as most vulnerable workers in these five targeted countries. IMA-Europe acts as the Secretariat of this project which is funded under the EC Budget Heading 04.03.03.01 Industrial Relations and Social Dialogue. The IMA secretariat has been in charge of preparing and submitting the call for EC funds in 2008 and is now in charge of the management of the project until January 2010, including the organization of events related to the project, in coordination with the partners.

The study is now in its first phase; with the help of a consultant (Technologia), a questionnaire has been prepared and sent to a representative selection of participating companies for the collection of information on accidents causes, existing guidance, good practices and procedures as well as other relevant industry experience. The second phase of the project consists of a seminar to take place on 3-4 September 2009 in Brussels, at which industry experts will discuss the findings and identify the gaps in the study. Phase 3 will consist of a closing conference to be held in November 2009 at which the results of the study will be disseminated, best practices and procedures will be defined and draft training tools and other follow-up actions will be recommended for implementation in companies.



OSHA-EU Healthy Workplaces campaign

IMA-Europe is a partner of the Healthy Workplaces campaign organised by the European Agency for Safety and Health at Work (EU-OSHA). The campaign aims at reducing work-related accidents and illnesses by focusing on risk assessment. On 17 March 2009, at a ceremony attended by more than 80 participants, Mrs. Florence Lumen, IMA-Europe Senior Adviser Health & Safety, received from Mr. Spidla, EU Commissioner Social Affairs, the official partner certificate together with the other partner organisations of the campaign (see picture).

Although not retained for the final selection, NEPSI has received a Good Practice Certificate for its positive contribution to the promotion of risk assessment via its Good Practice Guide and its detailed task sheets (OSHA Awards May 2009). IMA-Europe, as the NEPSI Secretariat, will consider preparing the participation of NEPSI in the next two-year Campaign of the OSHA-EU which will be dedicated to 'Maintenance'.



IMA Metrology and Hygiene Working Group activities

Over the last year, the IMA Metrology WG chairperson Ms Pensis, with the support of her WG colleagues, finalised the article on the IMA dustiness project submitted on 6 May 2009 for peer review to *Annals of Occupational Hygiene*. The article was welcomed by the Journal and it is expected to be published end of 2009. It is co-authored with the two providers of the dustiness methods, i.e. the IGF (Dr. D. Dahmann in Germany) and the HSL (Dr. D. Mark in the UK).

The project, launched in 2004, consisted in determining the dustiness of a set of minerals using the two methods proposed by the dustiness CEN standard EN 15051 and in comparing the results. Major discrepancies were observed between the outcomes of the two methods. As a result of this IMA project, the standard is now being revised by CEN TC 137 WG 3. The two methods will still be in the new standard but it will be specified that each of them simulates different processes and do not give the same results. There is a discussion to delete the classification classes as it seems clear that this dustiness coefficient cannot be used to classify products.

According to the IMA Metrology WG, the usefulness of these dustiness methods is that it enables to compare one product to another in terms of their potential to release dust. However while it allows for relative comparison, in no case it provides an absolute dustiness measure.

The IMA Metrology WG has also carried out sedimentation experiments to check the validity of the SWeRF (Size-Weighted Respirable Fraction) method and reached a consensus in July '09 for recommending a standardisation of the method through CEN. See Issue Fact Sheet on the SWeRF dated August 2009.

As regards the IMA Hygiene Programme, the Dust Monitoring Database continues to grow and contains today about 12.500 exposure data in total. The next IMA Analysis Report will be released on the occasion of the traditional IMA Hygiene Debriefing Meeting to be held on 19/20 November 2009 in Maastricht.

Contacts have been made with mineral sectors not yet covered by the database and IMA-Europe is confident to welcome a significant amount of new participants before the end of 2009. Thanks to this unique database of exposures, IMA-Europe is in a good position to reply to the request for exposure data which will come from the consultants conducting the impact assessment for a possible revision of the Carcinogens Directive (see chapter on RCS developments).

As part of our commitment to the OSHA "Healthy Workplaces" campaign, of which IMA-Europe is a partner, part of the hygiene debriefing meeting will be dedicated to 'Risk Assessment' and the campaign material will be promoted and used. The Hygiene WG intends to recommend that IMA-Europe participates in the next two-year OSHA-EU Campaign which will be dedicated to 'Maintenance'.

Financial Report

	2008 BUDGET	2008 ACTUAL	2009 BUDGET
REVENUES			
Membership fees	975.128	973.091	1.030.000
Bank interests	1.500	1.661	1.500
Extra funding	17.660	12.738	-
Extra funding office move	75.660	70.000	-
Refunds & extra income	-	11.115	-
Funding NEPSI Council & Secretariat	25.000	61.429	15.000
Total	1.094.754	1.130.033	1.046.500
EXPENSES			
Employment	700.000	701.177	743.000
Office rent & fixed charges	106.000	105.012	146.000
Office running expenses	55.000	56.851	57.000
Extranet running expenses	18.500	15.123	14.000
External membership	3.000	1.675	3.000
Legal & accounting expenses	6.500	2.736	6.500
Meeting and travel costs	30.000	30.574	35.000
Tax/Insurance/Bank	8.000	4.653	6.000
Equipment	15.000	18.993	6.000
Consultancy/Research support	25.000	15.354	10.000
Special Projects (LCA Project)	106.122	107.113	
PR & Communication	45.000	38.465	25.000
Office move	75.130	82.486	
NEPSI Council & Reporting	14.695	134.164	
Total	1.207.947	1.314.375	1.051.500
Surplus <Deficit> for the year	(113.321)	(184.342)	(5.000)
Accumulated surplus B/FWD	211.189	211.189	26.847
Closing surplus C/FWD	97.996	26.847	21.847
Working Capital	50.000	50.000	50.000

Financial Report for the fiscal year ending 31 December 2008

In 2008, revenues totalled €1.130.033. The membership fees for 2008 amounted to €973.091. The expenses are within the budget with a slight overspending for IT maintenance while some savings have been made in legal, accounting and consulting research support expenses.

The NEPSI expense amounting to €134.164 is explained by the transfer of the NEPSI funds (administrated by IMA-Europe) to a separate bank account. This extraordinary expense in the IMA budget thus represents a regularisation of the IMA accounts versus the NePSi accounts. Overall the NEPSI balance over the last five years is nil as expected.

The accounts of IMA-Europe have been revised by an external auditor (O. de Bonhome).



Biodiversity is the foundation of life on earth and a prerequisite for sustainable development. Yet, biodiversity is being lost at an unprecedented rate, seriously eroding the capacity of our planet to sustain life. It is for this reason that world leaders attending the World Summit on Sustainable Development in Johannesburg in 2002 agreed to achieve a significant reduction in the rate of loss of biodiversity by the year 2010.

Industrial minerals play a vital and valuable part in human wellbeing, providing products that meet the needs of today's society. We, the members of the European Industrial Minerals Association, representing more than 850 sites employing around 35.000 people, are aware that biodiversity is crucial to the future of humanity and have agreed to actively work towards its conservation and enhancement

WE RECOGNISE THAT:

- Our activities and the products and services we provide have a potential impact on biodiversity, at operational sites and within each local community
- Biodiversity must be taken into account before, during and after extraction and that its successful management can potentially lead to the creation of new natural areas and habitats
- Effective environmental stewardship is a crucial factor governing the future of our business

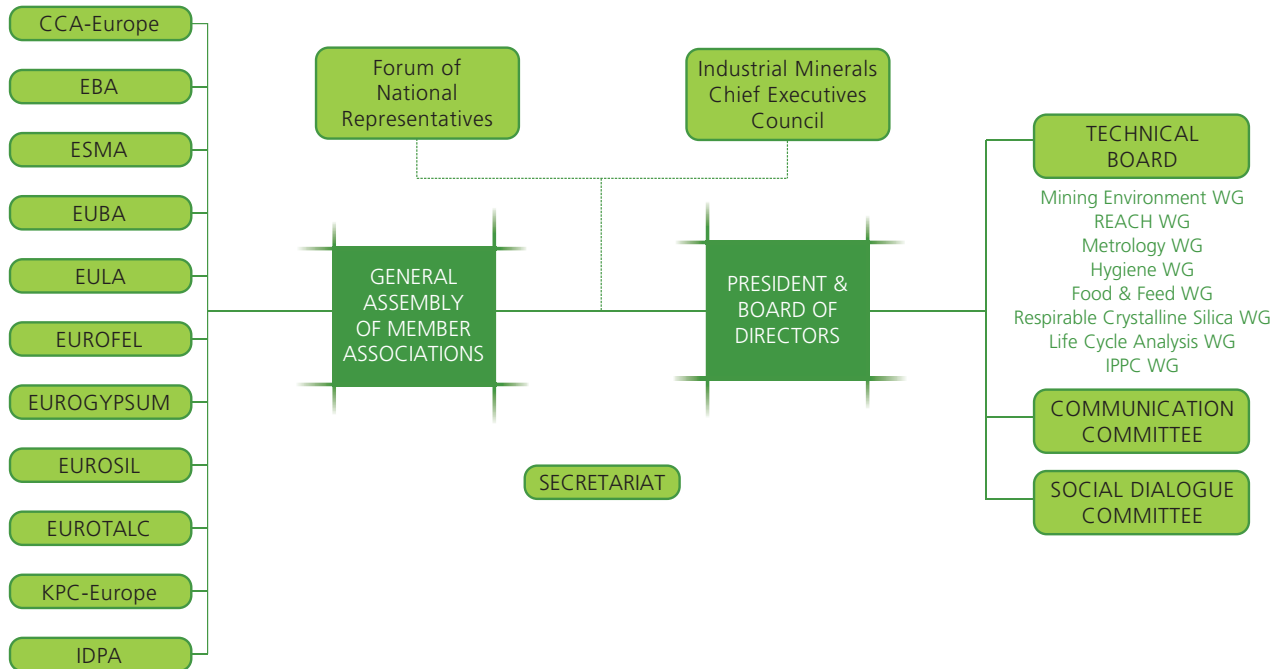
WE UNDERTAKE TO:

- Integrate the identification, evaluation and management of biodiversity into our business decision-making processes
- Attempt to understand the diversity of species and the richness of ecosystems at future mining sites before embarking on any new mining projects
- Preserve or promote biodiversity throughout the operation's lifetime at all our sites as far as possible
- Assess direct, secondary and cumulative impacts on biodiversity at current sites using a phased approach
- Meet requirements set out in applicable biodiversity related legislation and regulations
- Support the development and implementation of sound, scientifically based approaches to conservation of biodiversity
- Work in partnership with government, communities and other stakeholders on biodiversity
- Seek similar standards and principles with regard to biodiversity from all third parties involved in our businesses-suppliers, vendors and contractors
- Support the implementation of the European Commission Biodiversity Communication
- Promote compatibility between extractive activities and Natura 2000 areas
- Actively promote Countdown 2010 and the European Union's 2010 target which aims to halt the loss of biodiversity by 2010
- Promote events to enhance awareness of biodiversity
- Provide regular reports that verify progress on biodiversity conservation

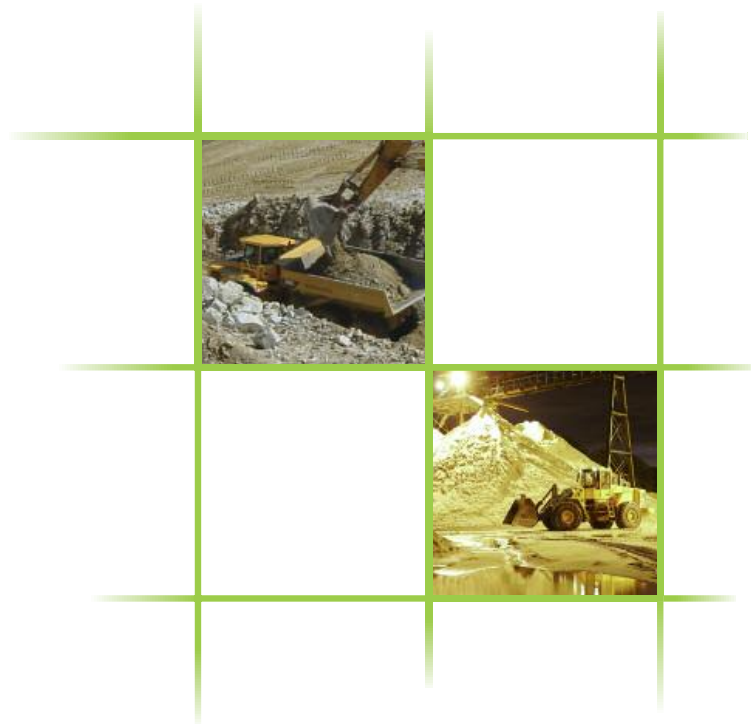


Thierry SALMONA,
 IMA President
 12 December 2008

IMA Structure



- CCA-Europe** European Calcium Carbonate Association
- EBA** European Borates Association
- ESMA** European Specialty Minerals Association
- EUBA** European Bentonite Association
- EULA** European Lime Association
- EUROFEL** European Association of Feldspar Producers
- EUROGYPSUM** Association of European Gypsum Industries
- EUROSIL** European Association of Silica Producers
- EUROTALC** European Association of Talc Producers
- KPC-Europe** European Kaolin and Plastics Clays Association
- IDPA** International Diatomite Producers Association



To find out more visit
www.ima-europe.eu



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