



EU priorities and the EU policy and regulatory environment

EU-Canada Bilateral Dialogue on Raw Materials

CETA Art. 25.4

1st meeting

Brussels, 16 November 2018



European Commission
Directorate-General for Internal Market, Industry,
Entrepreneurship and SMEs (DG GROW)
Resource Efficiency and Raw Materials Unit

Raw Materials Initiative

EU policy
- **CRM list**

EIP on Raw Materials
Strategic Implementation Plan

H2020-Raw Materials

Ensure
level playing field
in access to resource
in third countries

Foster
sustainable supply
from European
sources

Boost
resource efficiency
and recycling

Commission priorities 2015-19

1. Jobs, Growth and Investment
- *circular economy and green growth*
2. Digital Single Market
3. Energy Union
- *transition to a low-carbon economy (renewables, electricity market, mobility...)*
4. Internal Market
- *unlock the full potential of the single market*
- *a renewed EU Industrial Policy Strategy*
6. Trade policy to harness globalisation
- **economic diplomacy**
- *raw materials chapters in FTAs*
9. A stronger global actor
- **international cooperation**
and development

A renewed EU Industrial Policy Strategy (2017)

Investing in a Smart, Innovative and Sustainable Industry



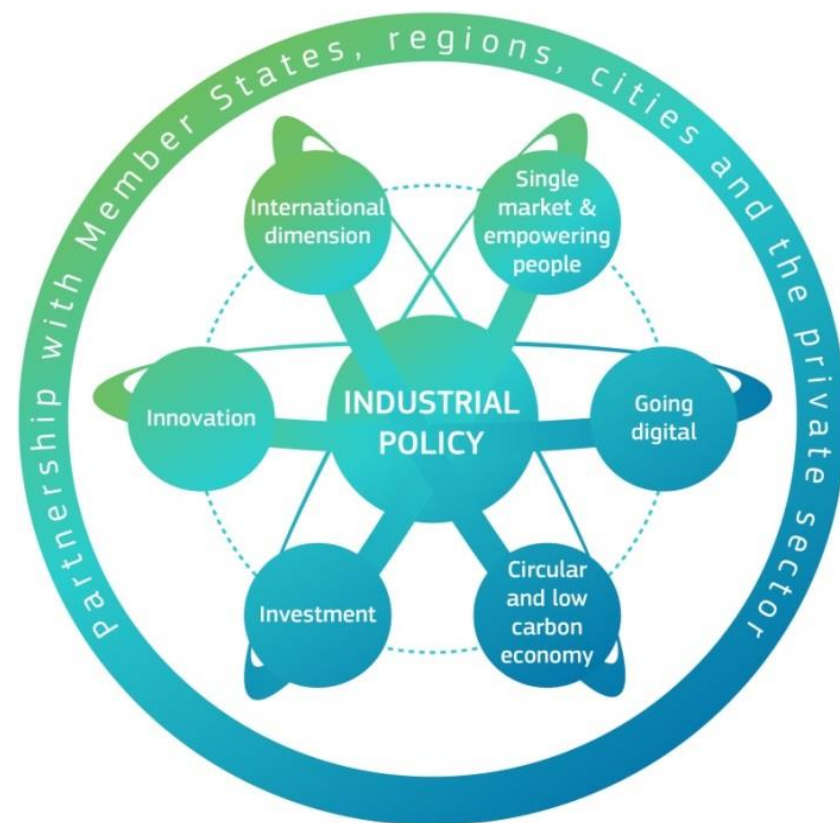
Upgrading industry for the **digital age**



Supporting industrial innovation **on the ground**



Building on Europe's leadership in a **low-carbon** and **circular economy**



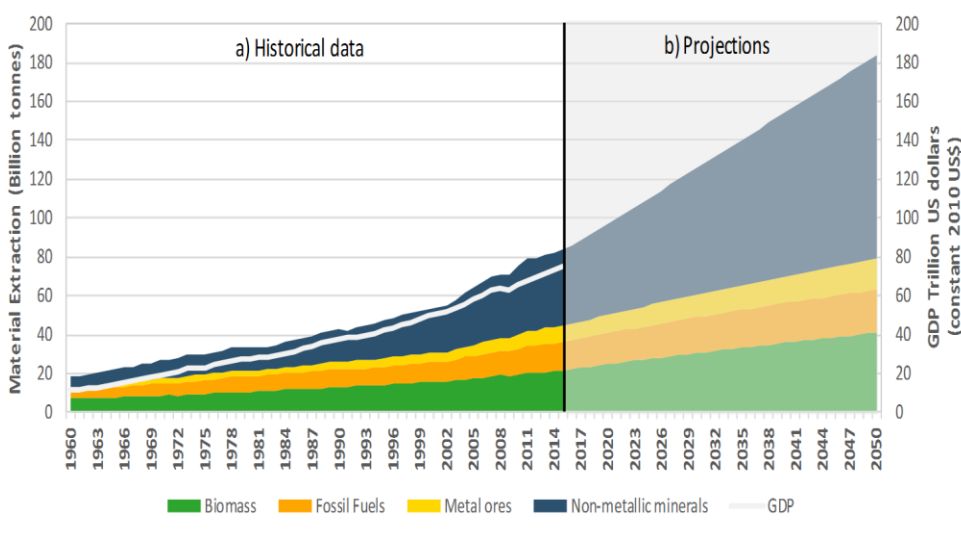


EU summit conclusions adopted on 22 March 2018 in Brussels: The European Council invites the Commission to present by the first quarter of 2019, in accordance with the Paris Agreement and taking into account the national plans, a proposal for

a Strategy for long-term EU greenhouse gas emissions reduction

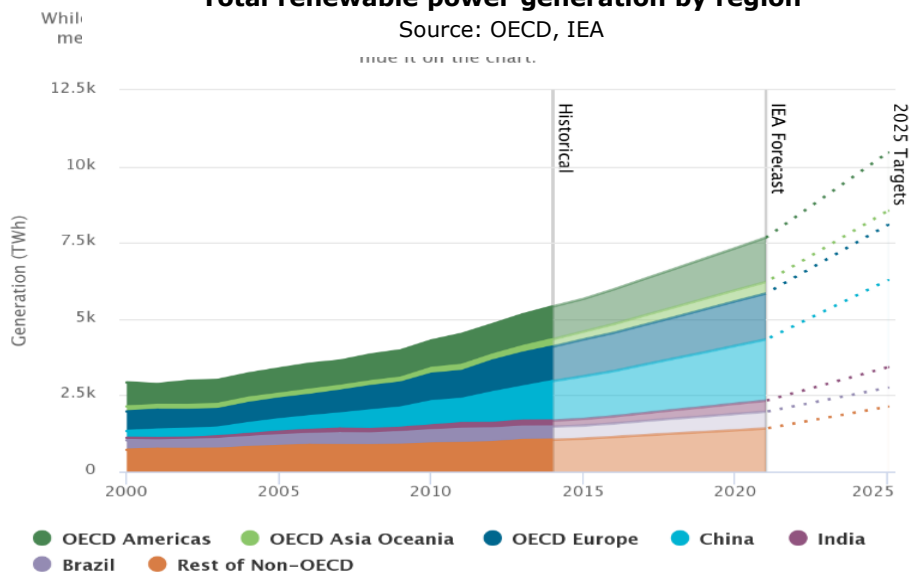
Global material extraction by resource type

Source: Raw materials Scoreboard 2018 in preparation, UNEP, World Bank



Total renewable power generation by region

Source: OECD, IEA



COM (2018)293: Europe on the move – Sustainable Mobility for Europe: safe, connected and clean

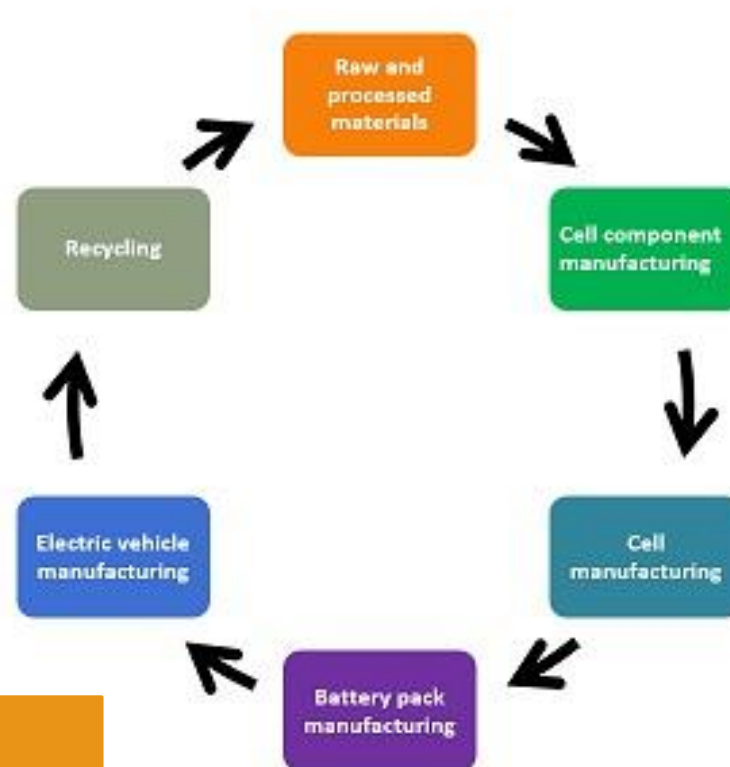
Strategic Action Plan on Batteries

- **Secure Access to raw materials from resource-rich countries outside the EU, facilitate access to European sources of raw materials, as well as accessing secondary raw materials through recycling in a circular economy of batteries**

SWD(2018)245 – Report on Raw Materials for Battery Applications

Domestic and international dimension

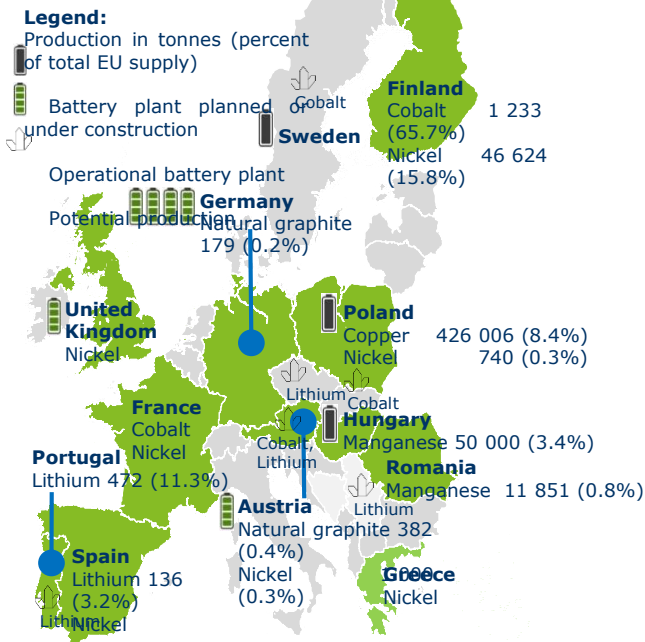
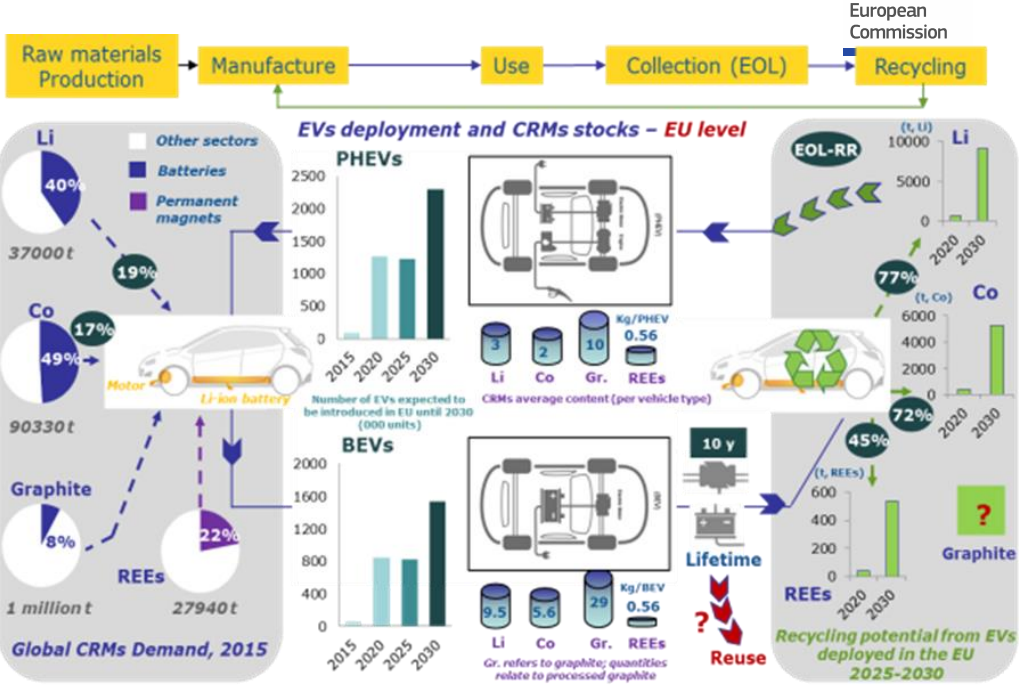
Batteries Value chain



EU Industrial Policy Strategy

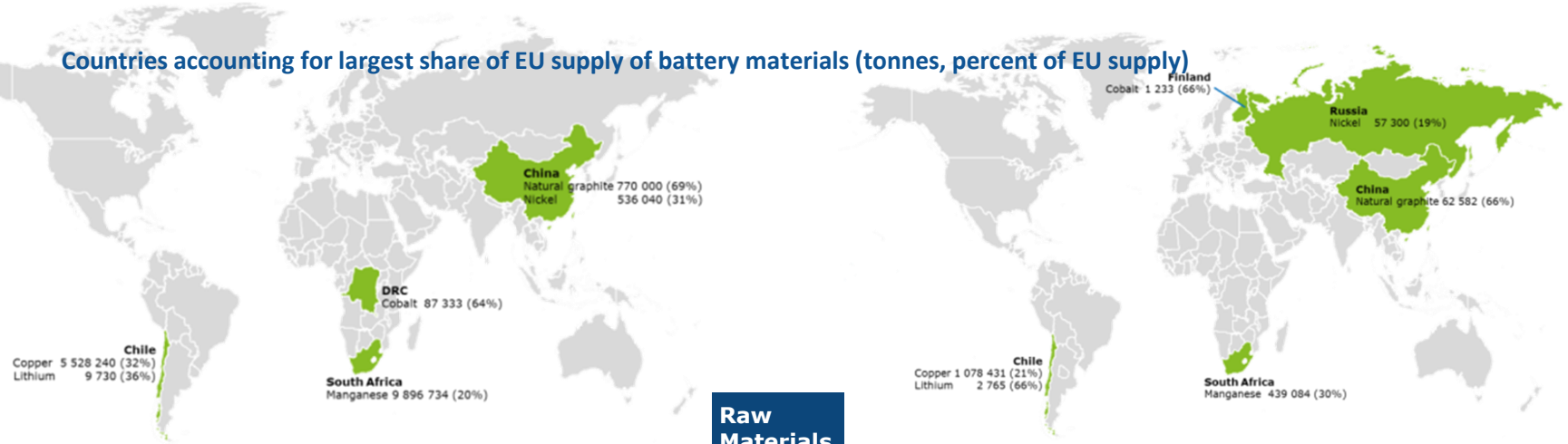


Strategic Action Plan for Batteries

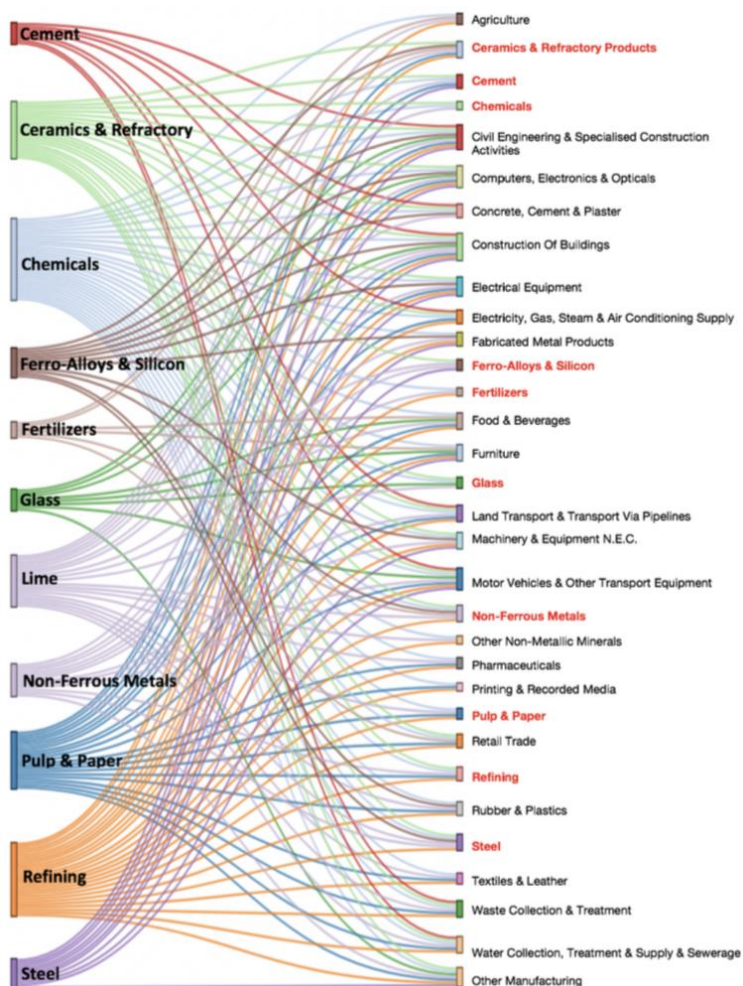


Source: EU Criticality assessment 2017

Countries accounting for largest share of EU supply of battery materials (tonnes, percent of EU supply)



Raw Materials



EIs are the lifeblood of key value chains in EU but also their supply chains are linked to other EIs.

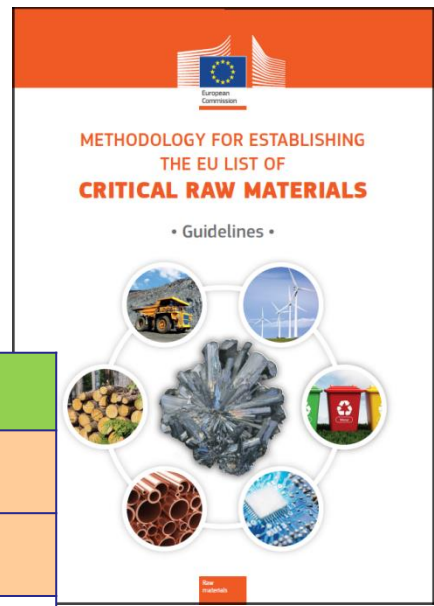
EIs products are and will be needed more to enable the energy transition and will be at the forefront of low-carbon solutions.

Most EIs already see recycled materials, waste and by-products of other industries as important raw material inputs.

Source: Industrial Value Chain a Bridge Towards a Carbon Neutral Europe, VUB IES, 2018



- **78 raw materials** evaluated with **fact sheets available, revised methodology** published – CRM website
- Commission's Communication on **2017 list of Critical Raw Materials for the EU**, COM(2017)490, 13.9.2017



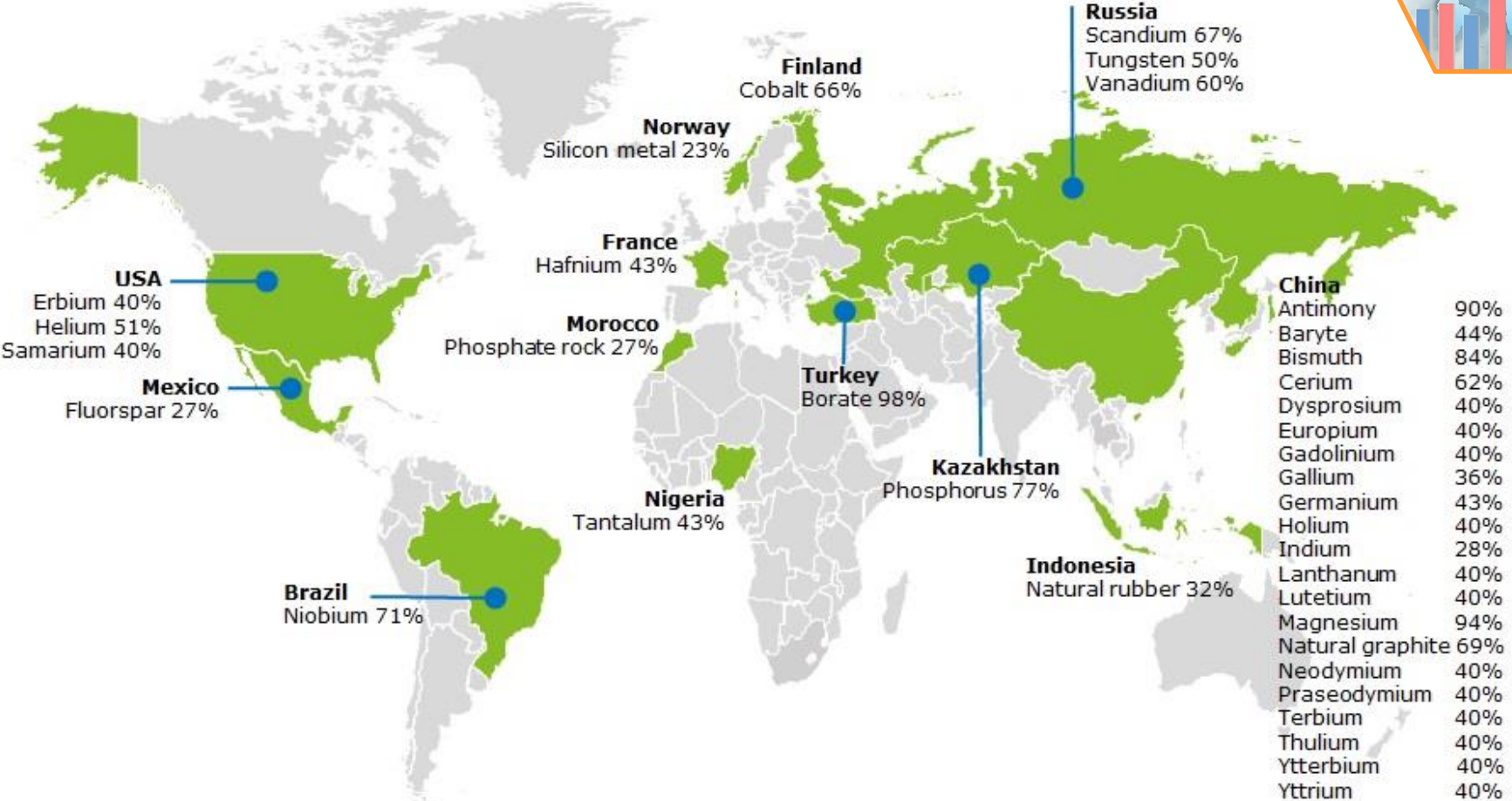
2017 CRMs (27)			
Antimony	Fluorspar	*LREEs	Phosphorus
Baryte	Gallium	Magnesium	Scandium
Beryllium	Germanium	Natural graphite	Silicon metal
Bismuth	Hafnium	Natural Rubber	Tantalum
Borate	Helium	Niobium	Tungsten
Cobalt	*HREEs	*PGMs	Vanadium
Coking coal	Indium	Phosphate rock	

*HREEs=heavy rare earth elements, LREEs=light rare earth elements, PGMs=platinum group metals

Biggest suppliers of CRM to the EU



EU Critical Raw Materials Trade



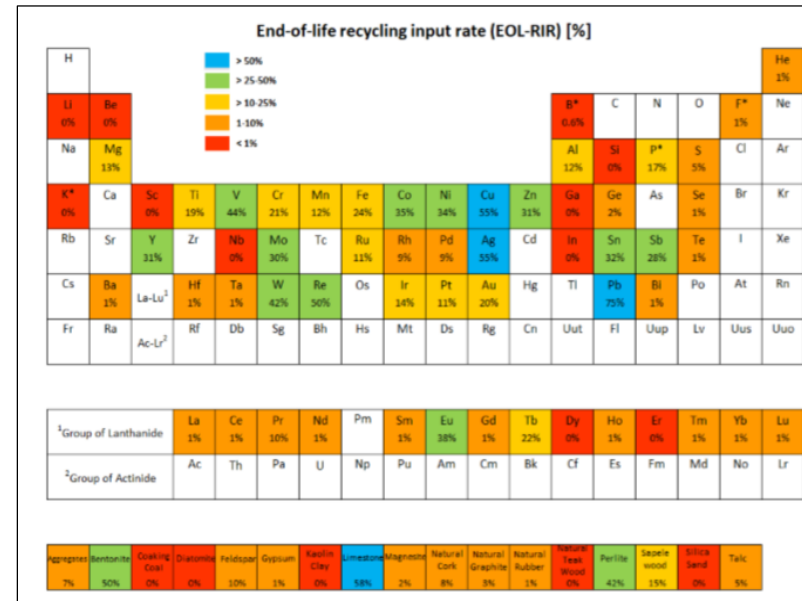
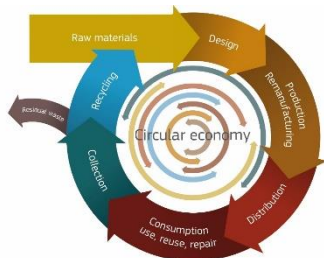
Source: Study on the review of the list of critical raw materials 2017

Report on CRM and the Circular Economy

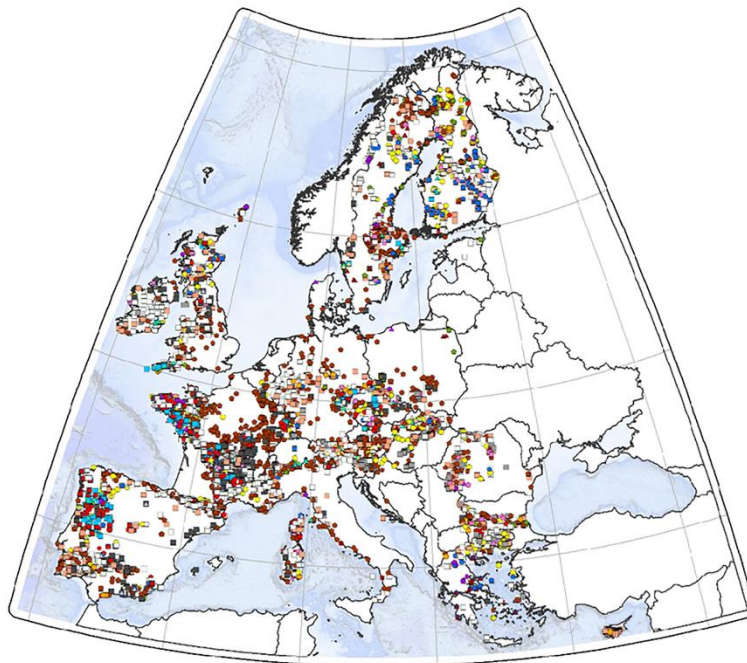
Issued in January 2018, taking into account the list of 27 critical raw materials (Sep 2017)
Report on Critical Raw Materials and the Circular Economy – Commission Staff Working Document SWD(2018) 36 final

Objectives:

- To ensure a coherent and effective EU approach to **critical raw materials** in the transition to a circular and low-carbon economy – aiming at increased circularity of critical raw materials.
- Provide **information to stakeholders**.
- Provide **key data sources** and identify **best practices** and possible further actions.
- To help Member States implement the new provisions on **critical raw materials** in the **Waste Framework Directive** – i.e. in relation to waste prevention and waste management.



Legal regimes for mining of non-energy mineral resources is a Member State competence



- Member States are responsible for the regulatory regimes for mineral exploration and extraction
- The EU has a coordination role and facilitates the Exchange of good practices

Report

Evaluation and Exchange of Good Practice for the Sustainable Supply of Raw Materials

Published in 2014

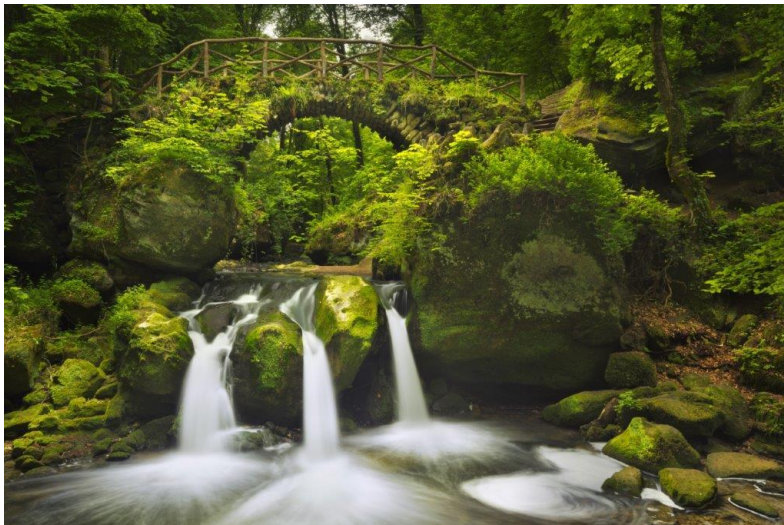
Provide examples of good practices in the EU:

- Policy and legislative framework (5)
- Information and Knowledge Base (5)
- Governance (6)
- Land Use Planning (4)
- Permits and authorization (5)



EU has competences on environmental and health and safety regulations covering extractive activities

- **Horizontal regulation – e.g. Environmental Impact Assessment Directive, Water Framework Directive, Nature Directives**
- **Sectorial regulation – e.g. Extractive Waste Directive**



Thank you!



EU Raw materials, metals, minerals and forest-based industries:

https://ec.europa.eu/growth/sectors/raw-materials_en

Critical raw materials for the EU:

http://ec.europa.eu/growth/sectors/raw-materials/specific-interest/critical_en

Commission Staff Working Document "Critical Raw Materials and the Circular Economy"

https://ec.europa.eu/commission/publications/report-critical-raw-materials-and-circular-economy_en

Commission Staff Working Document "Report on Raw Materials for Battery Applications":

<https://ec.europa.eu/transport/sites/transport/files/3rd-mobility-pack/swd20180245.pdf>

EIP on Raw Materials:

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