EU-Latin America Economic Diplomacy – Raw Materials

How to succeed in the mining sector in Latin America

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Resource Efficiency and Raw Materials Unit
EU Raw Materials Strategy and Commission priorities

**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*

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**Raw Materials Initiative**

- *EU policy*
- EIP on Raw Materials
- *Strategic Implementation Plan*
- H2020-Raw Materials

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- **Ensure level playing field in access to resource in third countries**
- **Foster sustainable supply from European sources**
- **Boost resource efficiency and recycling**
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

Partnership with Member States, regions, cities and the private sector

International dimension
Single market & empowering people
Going digital
Innovation
Investment
Circular and low carbon 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


**Domestic and international dimension**
**Commercial projects**

**Lithium** (reserves)
- Alvarrões, Mina do Barroso (PT): 38,940 t
- Keliber (FI): 35,750 t

**Potentially commercial projects**

**Lithium** (resources; reserves)
- Alvarrões, Mina do Barroso: 79,110 t
- Argemela, Sepeda (PT): 89,810 t
- Cinovec (CZ): 1,285,790 t
  - Keliber (FI): 50,970 t
  - San Jose (ES): 313,860 t
  - Wolfsberg: 51,160 t
  - Zinnwald (DE): 132,740 t

**Non-commercial projects**
- Co (10); Li (3); Graphite (2); Ni (6)

**Exploration projects**
- Co (25); Li (16+40); Graphite (28); Ni (21)
Period 2014 – 2017 – EU-Latin America Raw Materials Diplomacy Dialogues (RMDD)

- Implemented at regional level
- Countries part of the regional dialogue: Argentina, Brazil, Chile, Colombia, Mexico, Peru and Uruguay
- 2014 – Peru; 2015 – Colombia; 2016 – Chile; 2017 – Argentina
- Topics addressed: Governance, policy and trade; mining potential and investment, research, skills and innovation, exchange of good practices & cooperation on technical, environmental security, health and social issues

- Funded by the Partnership Instrument
- Same geographical coverage as the EU-Latin America RMDD
Objective: advance and promote EU and Mutual interests (Art. 1)

1. Addressing global challenges, promoting policy dialogue and cooperation partnership strategies
2. Implementing the international dimension of the 'Europe 2020' Strategy (green growth, research and innovation, sustainability)
3. Improving market access & developing trade & business opportunities for companies through economic partnerships, business and regulatory cooperation
4. Enhancing widespread understanding and visibility of the Union on the world scenes by means of public diplomacy, education/academic cooperation & outreach activities
EU-LA Mineral Development Network Platform Objectives

EU-LA Mineral Platform is a network platform that facilitates cooperation and exchange of information between EU and LA stakeholders, from mining authorities, industry, business (including SMEs), academia, geological surveys and other entities, covering the entire mining value chain.

The Platform focus on achieving mutual benefits in the fields of technology, consulting services, infrastructure, investment, trade, training and skills, health and safety, good governance and other relevant areas for the mining value chain.
a study comprising a comprehensive analysis of the non-energy extractive sectors and related technologies and services in each of the target countries and a thorough stakeholders' mapping exercise;

(ii) to build and implement a self-sustainable EU-LA MDNP supported by an information and knowledge digital service;

(iii) the organisation of a EU-LA mining and exploration convention & trade show for all stakeholders.
EU economic diplomacy – Raw Materials

www.mineralplatform.eu
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Services

Access to the full content of the Mineral Development Network Platform (MDNP) will be granted to registered members only (individuals or legal entities/companies meeting the eligibility criteria to be member of the platform).

Being member of the MDNP will allow you to:

✔ Easily find support to tackle your professional challenge.

✔ Network with other MDNP members from the EU Member States and Latin America in the different fields of the extractive industry sector life cycle.

✔ Find the right partner for your business, investment project, entity or research project identifying the stakeholders from the EU Member States and Latin America in the different fields of the extractive industry sector life cycle. More than 1000 relevant actors available on the database!

✔ Access to EU company profiles operating or investing in Latin America. Nearly 100 EU company profiles available on the database!

✔ Get an overview on the investments made by EU actors on exploration and mining in the non-energy extractive sectors in Latin America.

✔ Get an overview of the EU- Latin America business & cooperation actions in all services related to the extractive industries life cycle.

✔ Access the Country fiches tool to get an overview of the non-energy extractive sector of a group of Latin American countries (Argentina, Brazil, Chile, Colombia, Mexico, Peru and Uruguay) and its strengths, challenges, opportunities and threats.

✔ Access information on public and private funding instruments & tax incentives at EU and Member States level and in Latin America or from global entities for EU-Latin America cooperation support. Nearly 500 instruments available on the database!

✔ Get access on the Library to relevant reports or studies and share information you consider relevant with other MDNP members.
INFORMATION HUB

✓ Already more than 1000 institutions
✓ Partner search tool
✓ Information about mining sector of 7 LA countries
✓ Customized country fiches for more than 40 indicators
✓ Past and ongoing projects, initiatives and investments
✓ Database of 500 public and private funding instruments
✓ Much more....
Member’s AREA

Partner searching tool

All identified actors with linkages to the extractive industries in the EU and Latin America are included in a database that is available for MDNP members through the Partner Finder tool.

The Partner Finder database includes information on actors (e.g. a short description of the various types of organisations, their field of work, web links, etc.) categorized based on the specific fields of activity. Thus, it serves as an easy-to-use tool to find partners for cooperation purposes and contact points in the EU and Latin America alike.

<table>
<thead>
<tr>
<th>Organisation Name</th>
<th>Organisation Category</th>
<th>Country</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abside</td>
<td>INDUSTRY (incl. SMEs)/Equipment/Machinery</td>
<td>Chile</td>
<td>Einstein 863, Recoleta, Santiago de Chile</td>
</tr>
<tr>
<td>Bucanc</td>
<td>INDUSTRY (incl. SMEs)/Equipment/Machinery</td>
<td>Chile</td>
<td>León de la Barra 9464, Lo Espejo, Santiago de Chile</td>
</tr>
<tr>
<td>Diamantina Christensen</td>
<td>INDUSTRY (incl. SMEs)/Equipment/Machinery</td>
<td>Chile</td>
<td>Lo Campino 432, Quillcura, Santiago de Chile</td>
</tr>
<tr>
<td>Ecochem Group</td>
<td>INDUSTRY (incl. SMEs)/Equipment/Machinery</td>
<td>Chile</td>
<td></td>
</tr>
<tr>
<td>Grupo Inzamac</td>
<td>INDUSTRY (incl. SMEs)/Equipment/Machinery</td>
<td>Chile</td>
<td>Av. Crístobal Colón 531, Panchaga</td>
</tr>
<tr>
<td>Maastranza Diesel</td>
<td>INDUSTRY (incl. SMEs)/Equipment/Machinery</td>
<td>Chile</td>
<td>Santa Elena 1431, Santiago de Chile</td>
</tr>
<tr>
<td>Myvar</td>
<td>INDUSTRY (incl. SMEs)/Equipment/Machinery</td>
<td>Chile</td>
<td>Teriente Montt. nº 1957, Ñuñoa</td>
</tr>
</tbody>
</table>
### Member’s AREA

#### Country Fiches

Access the Country fiches tool to get an overview of the non-energy extractive sector of the Latin American countries Argentina, Brazil, Chile, Colombia, Mexico, Peru, and Uruguay classified by categories and indicators. Country fiches can be also downloaded as PDF on the tool.

A SCOT analysis (Strengths, Challenges, Opportunities and Threats) of the countries is also provided including a downloadable PDF with information of the bibliography of the data collected.

#### 1. Select one or several indicators from the categories below:

<table>
<thead>
<tr>
<th>Socio-economic framework</th>
<th>Regulatory framework related to extractive activities</th>
<th>Geology and Commodities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic information</td>
<td>Government and judiciary systems</td>
<td>Geological / Metallogenic Map</td>
</tr>
<tr>
<td>GDP</td>
<td>Exploration Licenses</td>
<td>Geoscientific data availability and reliability</td>
</tr>
<tr>
<td>Inflation rate</td>
<td>Mining Licenses</td>
<td>Mineral Production</td>
</tr>
<tr>
<td>Unemployment Rate</td>
<td>Mining Code</td>
<td>Mineral Reserves</td>
</tr>
<tr>
<td>Macro relevance of the extractive sector</td>
<td>Permitting Procedures</td>
<td>Active Mines (non-exhaustive)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Infrastructure</th>
<th>Focus: EU – Country’s trade and investment</th>
<th>Community and environment</th>
<th>Stakeholders in Mining</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transport Infrastructure</td>
<td>European Union Trade with Country</td>
<td>Water resources</td>
<td>Relevant Governmental institutions</td>
</tr>
<tr>
<td>Energy for Mining</td>
<td>Trade Tariffs</td>
<td>Water for Mining</td>
<td>Mining Companies (domestic)</td>
</tr>
<tr>
<td>Principal Export Destinations, Year</td>
<td>Main Resource/Mining related exports to country</td>
<td>Protected Areas</td>
<td>Mining Companies from EU</td>
</tr>
<tr>
<td>Principal imports/Year</td>
<td>Main Resource/Mining related imports from country</td>
<td>Mining Liabilities</td>
<td>Universities (curriculum related to Extractive Sector)</td>
</tr>
<tr>
<td>Exports –Value</td>
<td></td>
<td>Mining and society</td>
<td></td>
</tr>
</tbody>
</table>
Target Groups

- Junior and senior exploration and mining companies
- Industrial mining associations
- Mining equipment and technology suppliers, including SMEs
- Mining consulting and services companies
- Public mining bodies
- Funding and financial entities
- Geological Surveys from the EU and Latin America
- R&D&I entities from EU and Latin America
- EU and Latin American universities
- Infrastructure developers for the mining life cycle
- NGOs active in the mining sector
EU-Latin America Raw Materials Diplomacy events

The main objective of the EU-Latin America Raw Materials Diplomacy events is to discuss an action plan to implement the regional co-operation between the EU and Latin American countries part of the regional dialogue (Argentina, Brazil, Chile, Colombia, Mexico, Peru and Uruguay) on the mining sectors, based on mutual interests.

Find out more about the European Commission’s Raw Materials Diplomacy.

The following “EU-Latin America Dialogue on Raw Materials” events have taken place (clicking on each one you will be able to download the Agenda, the Presentations and various materials from the event):

- **8-9 May 2017**
  Buenos Aires (Argentina)

- **25-26 April 2016**
  Santiago de Chile (Chile)

- **22-23 September 2015**
  Cartagena de Indias (Colombia)

- **16-11 March 2014**
  Lima (Peru)
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METS2018: EU-Latin America Mining & Exploration Convention and Trade Show
Opportunities in internationalisation with Enterprise Europe Network
Enterprise Europe Network

enterprise europe network

3000 LOCAL EXPERTS

600+ LOCATIONS

60+ COUNTRIES WORLDWIDE

een.ec.europa.eu
6 EEN partners present in CZ

A broad range of services for growth-oriented SMEs
The gateway for your business to international growth markets
Enterprise Europe Network services

EEN- 17 key sectors

Network experts in 17 key sectors have teamed up to provide SME with customised support

Aeronautics and space
Agrofood
Automotive, Transport and Logistics
BioChemTech
Creative Industries
Environment
Healthcare
ICT Industry & Services
Intelligent Energy
Maritime Industry and Services
Materials
Nano and micro technologies
Services and Retail
Sustainable Construction
Textile & Fashion
Tourism and Cultural Heritage
Women Entrepreneurship
Thank you for your attention!