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INTRODUCTION & AIM OF THE CONFERENCE

*A new necessary approach
for the evaluation, sustainable financial- environmental implementation
and governance
of dimension stones projects*

Technical coordination by







BACKGROUND

“The **mining industry** is a key contributor to national and global economies; never more so than at present with soaring demand for the commodities that it produces. It is an important international business that depends on the trust and confidence of investors and other stakeholders for its financial and operational well-being. Unlike many other industries, it is based on depleting mineral assets, the knowledge of which is imperfect prior to the commencement of extraction. It is therefore essential that the industry communicates the risks associated with investment effectively and transparently in order to earn the level of trust necessary to underpin its activities”” (source : www.criresco.com)

The continuing rise in global population and living standards, as well as technological innovation, leads to increasing requirements for a broader range of metals, minerals and other raw materials, like Dimension Stones or Natural Stones (DS-NS), Construction Materials (CM) and Industrial Minerals (IM)

EU manufacturing and improved positioning of EU enterprises in the global value chain is currently highly dependent on imports of mineral raw materials from outside Europe. This dependency is associated with the contraction of primary mining in the EU over several decades, driven by lower costs outside the EU and pressures to protect the natural environment within the EU. Increasingly, EU supply chains for raw materials are adversely affected by growing demand pressure from emerging economies and by an increasing number of national policy measures that disrupt the normal operation of supply chains. This dependence on supply chains that are largely beyond EU control gives rise to risks related to security of raw materials supply, but also highlights opportunities for expanding primary extraction and recycling within the EU in line with sustainable development objectives (source : *EU Raw Material Initiative website*)

In particular, the **natural stone industry**, that represents an unique and particular sector, different from any other part of the mining industry, needs, more than others, to improve innovation in mining and its skills, technologies and methodologies in exploration and project evaluation, for sustainable development in the long-term future.

For many centuries, the Industry has represented a key asset for most European countries and societies, with historical source districts and famous attractive materials, still much in demand in the international market.

Now in the EU, as well on a global scale, the creation of a new modern and innovative **natural stone sector**, operating on a basis of social, environmental and economic sustainability, will be imperative to keep this important EU and worldwide traditional industry alive.

The International Conference STONECHANGE 2016 - “STONE SECTOR AND CHANGING TRENDS” and the connected PERC TRAINING COURSE on “MINERAL STANDARD REPORTING” (see specific document) wish to be “tools” to reach this goal, by attracting industry stakeholders to discuss existing opportunities, technologies, and the necessary actions to be taken.





AIM OF THE CONFERENCE

STONECHANGE 2016 - “STONE SECTOR and CHANGING TRENDS”, aims to create awareness of the new developing trends and opportunities of relevance to the Natural Stone (NS) Industry, among all industry stakeholders including: i) SMEs and larger companies, ii) mining, marketing and financial consultants and experts, iii) policy-making and support institutions (local, EU and international), iv) financial institutions and experts, v) representatives of international financial institutions such as stock exchanges and banks, vi) AIM sponsors, vii) sectoral associations, organizations and stone centers and, viii) any other players involved in the industrial development process.

In particular the STONECHANGE 2016 aims to promote the desirable sustainable development of the Natural Stone Mining Industry, absolutely necessary in the developed economies and societies in the EU and worldwide, to create a lasting future for the industry, to exploit in a sustainable way the continuing large potential and to fulfill the still growing and changing demand.

This necessary change, among other actions, should be made through the adoption of modern innovative approaches to exploration, evaluation and mining and of a desirable “Code of Ethical Conduct”, by all stakeholders.

In particular the adoption of a common reporting standard for evaluation of exploration results, resources & reserves, and in general mining projects in the EU, as well in other production areas, also for the Natural Stones Mining Industry, as used in all other mining industries, is nowadays an absolute 'must', to expedite the general increasing interest in the sector, including the task of attracting international investors.

Such an approach will contribute to the convergence of terminology and the comparability/ compatibility of data, thus facilitating the creation of a solid *European Knowledge Database* and a method of assessing resources of Construction Materials, Industrial Minerals and Dimension Stones.

This approach and consequent harmonization, is equally important to government policy-makers, local administrators and to companies within the minerals industry, the users and the providers of data on mineral resources and reserves, for the necessary sustainable modernization process of the industry and for a possible common harmonized language in the Legislative Framework, at least at EU level.

In fact central EU, national and local government authorities are often quite unaware of what is happening in the international industry and are not able to draft modern laws and/or to administer the sector with the necessary new modern vision.

Furthermore, it's important to make industry stakeholders aware of modern technologies and tools now available to facilitate and support the exploration, mining and processing of Natural Stones; this to improve the conditions for a more financially secure and environmentally sustainable industry, as naturally demanded by civil societies and institutions



High priority will be given to technical innovation, waste recycling and ethical code of conduct, all being main “pillars” of most of EU Institutional support programs.

, STONECHANGE 2016, the first event with this particular business and management approach for Natural Stones, aims to make the EU mining business community and local EU governance authorities aware that the development and implementation of a serious sustainable NS project, even in the developed EU, need not be a problem for the social community and environment but, on the contrary, can be a new opportunity for the economy on local, national, and European scales.

This happens at the right time, following the start of new EU programmes and initiatives supporting the mining industry (see EU programs below) and local traditional heritage, and moreover the fast, although often indiscriminate, development in other regions of the world (e.g. China, Far East, India, Arab world), generally characterized by large-scale investments and new professional evaluation methods, that often utilise international mining standards officially recognized by the mining and investing community.

Finally the new trend of large non EU NS Groups investing in Turkey and the EU must be considered as a key financial opportunity for this expected new sustainable development phase in the EU, too.

Consequently, STONECHANGE 2016 is open to all international DS players, EU and non EU, to financial and investment Groups, to mining and land regulatory and policy-making Authorities, to stock exchange and mining standards representatives and finally to international institutions supporting the mining sector, environmental authorities and, last but not least, the private sector (including SMEs and consultants).



Efforts for a Sustainable Mining





THE CONFERENCE IS IN PERFECT SYNTONY WITH KEY EU PROGRAMS and INITIATIVES

(e.g. EIP-EUROPEAN INNOVATION PARTNERSHIP and RMI-RAW MATERIAL INITIATIVE)

MAIN EIP OBJECTIVES

To reduce dependency on imports to promote the production and exports

- To improve supply conditions from EU
- To diversify raw materials sourcing
- To improve resource efficiency including recycling
- To find alternative raw materials

To put Europe at the forefront in RM sectors

- To make Europe a leader in the RM capabilities
- To mitigate environmental, social and health impacts

EIP PILLARS

Pillar 1: Fair and sustainable supply or natural raw materials from global market. Development policy and sustainable supply of raw materials. Reinforcing the raw materials trade strategy

Pillar 2: Fostering sustainable supply of natural raw material within the EU

Pillar 3: Boosting resource efficiency and promoting recycling (waste re-utilisation)

Pillar 4: Innovation

EIP WORK PACKAGES

WP1: Developing innovative technologies and solutions for sustainable and safe raw material supply; extraction, processing and recycling.

WP2: Developing innovative and sustainable solutions for the appropriate substitution of critical and scarce materials. *This is not the case of Dimension Stones*

WP3: Improving Europe's raw materials regulatory framework, knowledge and infrastructure bases. Standardization of geological data and identification & exchange of best practices in defining policies for minerals, land planning and regulation thereof in the EU Member States. It will also support actions to encourage and promote technical excellence and skill needed in EU in the Mining/Processing sectors.

WP4: Improving the regulatory framework conditions, notably by promoting excellence and prevention, preparation for re-use and recycling through public and private initiatives, for a correct optimization of the raw material added value. It will also apply product, standardization and certification policies as well as economic instruments for this aim.

WP5: Recognises the global market place of securing access to raw materials and promoting the use of environmentally-friendly extraction and processing technologies.



RMI PILLARS

Pillar 1: Ensuring a level playing field in access to resources in third countries

Pillar 2: Fostering sustainable supply of raw materials from European sources

Pillar 3: Boosting resource efficiency and promoting recycling

THE CIRCULAR ECONOMY ISSUE

In 2011 the world collectively extracted well over 16 trillion metric tons of mineral raw materials from the Earth's crust. On most estimates, that is a record. We currently use 1.5 planets' worth of resources every year including forests, land, metals and minerals while generating mountains of waste and, on current form, it looks like we may need more than 2 planets' worth of materials by 2050. This is clearly unsustainable.

The thrust is clear: We need to extend the life expectancy of resources by anticipating and planning for future applications. There is no way round it. Mining companies are going to have to become much more engaged with downstream users of their materials to better design sustainable products. To reach this forced goal a full sustainable production line has to be targeted by using all technological means for innovation and modernization of the industry to plan selective mining and to invest in recycling and re-use of waste produced.

Finally recycled waste has to be re-inserted in the Market Line as raw material.

*Dimension Stones (DS) and Natural Stone (NS) in general do not get out of this imperative "must" !!!
.....and STONECHANGE 2016 intends boosting the Industry to follow that.*

