

Summary Session

Governmental Responses to Mineral Production and Consumption

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Perceptions of Current Situation

- Increasing demand driven by China and others
- Demand for new metals
- Concentration of large companies
- Market price constraints, hedging, price swings
- Bottlenecks
- Decreasing grade and slow increases of capacity



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Widespread concerns about
security of supply.
Not true scarcity/depletion, but
rather disruption of flow.



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Some aspects of policy responses are consistent across regions, but in other cases significant diversion of philosophy and approach.



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Areas of Agreement

- Critical Minerals (REE or Cu and Fe?)
- Need for:
 - Security of supply, resource efficiency, and sustainability (defined in many different ways), but not always an integrated approach to minerals in sustainable development
 - Technological advances in exploration, mining, mineral processing, and recycling
- Desire to:
 - Increase domestic production
 - Diversify sources, including more recycling
 - Bilateral agreements/partnerships and supply stream/chain management



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Areas of Divergence

- Sustainable consumption and dematerialization
- Focus on:
 - Domestic versus international issues and interests
 - National/centralized control versus regional management
 - Dependence upon market forces versus government mandates



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Conclusions

- Not all mineral policies are mutually compatible or consistent with free market flows of mineral resources or secure supply in all regions
- Good mineral policies require consistency and integration, which is not yet happening in all countries
- Secure supply is not necessarily synonymous with sustainable supply
- But, that said...



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Conclusions

- The discussion of minerals and sustainable development has broadened and become much more complex and multidisciplinary.
- We are beginning to see a shift from mineral/material production to mineral/material management and LCA thinking.
- There is a much greater awareness of the importance of the minerals sector to sustainable development and of the fact that policies have impacts on resource availability.



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