



SEA Workshop: Ag and Pt

Draft minutes

Brussels, 10 October, 9:00-12:30

1. Welcome and Introduction

France Capon welcomed the participants. The meeting started by a tour de table (see Annex 1: list of participants).

At the outset, Francesco Carloni (Legal Counsel, K&L Gates) reminded to the participants the importance of ensuring the full compliance of the discussions with confidentiality and antitrust rules during the entire workshop.

This meeting has been held in compliance with the competition policy that has been adopted by EPMF. In particular, Francesco Carloni read the EPMF's competition compliance declaration and stressed that it was important to remember that EPMF's activities will not include any action, express or implied, formal or informal:

- To collectively fix, control, coordinate, maintain or otherwise affect prices, elements of pricing or other terms of competition. Accordingly, competitors at this workshop shall not share or discuss the current or future pricing information or intentions, or other commercially sensitive information (including business strategy), of any company;
- To boycott or refuse to deal with any third parties;
- To engage in any activities that have an anti-competitive objective or effect; or
- To engage in any efforts to divide customers, allocate territories or markets, restrict sales volumes or in any way agree to control members' output of products or services

The "do and don't" have been presented and been made available to the participants.

The agenda has been reviewed and approved by the participants.

2. Objectives of the project and of the workshop

France Capon reminded the objectives of the project and of the workshop. The main aim of the project is to gather the relevant data on volume/use to address next regulatory challenges and ensure that any potential prioritisation for further regulatory actions will be based on the best available information. The second objective is to gather the relevant data to be able to demonstrate the socio-economic importance of the precious metals industry in the EU.

The aim of the workshop is to review the aggregated data collected during the first phases of the project, confirm their validity and define how to improve them.



3. Platinum

1. Presentation of the Info sheet

Maxime Eliat presented the results of the data gathering exercise for Platinum and Platinum compounds.

2. Live survey (Sli.do)

An online survey on a no name basis has been organized to check the accuracy of the collected data (see results in Annex 2 of the minutes).

3. Discussion

The survey concluded that:

- Some figures must be clarified.
- Need to improve the header of the tables to clarify if volumes are expressed in metal content or substance tonnage.
- The mass flow analysis must be refined to better represent the supply chain (e.g.: an arrow must link the end uses and the input materials; clarifications must be added regarding the steps between input materials and occurrence of CIPts).
- The unspecified uses can be allocated to the existing ones (e.g.: intermediate uses must be higher) but figures must not be changed, only a comment should be included to ensure that numbers can be justified by the data gathered previously.
- The SEA data (turnover, employees etc.) will be aggregated at Precious Metals level because it is difficult to allocate to a specific metal group. Moreover, all the precious metals are interlinked into the production process in a company.

4. Silver

1. Presentation of the Info sheet

Maxime Eliat presented the results of the data gathering exercise for Silver and Silver compounds.

2. Live survey (Sli.do)

An online survey on a no name basis has been organized to check the accuracy of the collected data (see results in Annex 2 of the minutes).

3. Discussion

The generic comments made under Pt are also applicable to the silver info sheets.

The survey concluded that:

- Some figures must be clarified.
- The mass flow analysis must be refined to better represent the supply chain (e.g.: an arrow must link the end uses and the input materials).



- The unspecified uses can be allocated to the existing ones but other uses even if not covered by the registration dossiers must be mentioned (e.g. biocide, pharma and cosmetics).
- AgCl is not only used as intermediates. It has to be clarified with the batteries, biomedical and photographic sectors.

5. Conclusions and next steps

ACTIONS:

- Companies who challenged the figures are invited to contact the Secretariat before end of October to further discuss.
- Secretariat will amend the info sheet accordingly by December 2018.

Next steps:

- Finalisation of the infos sheets (end of November 2018).
- Validation of the infos sheets on Ag and Pt by the GA (5th December 2018).
- Conduct similar exercise on the remaining infos sheets using the same approach.

Overall the participants found the exercise very useful. Conference call - to be held under the same confidentiality and antitrust compliance protocols adopted during the workshop - could be also alternatives, as an increasing use of the sli.do during the meeting to allow confidential exchanges with the Secretariat. In the latter case, it is essential to ensure that this information will not be disclosed before being anonymized and aggregated consistent with EPMF's competition policy.



Annex 1: Participants

Roland BRASCH, Heraeus (Germany)
France CAPON, EPMF (Belgium)
Francesco CARLONI, K&L Gates (Belgium)
Eliot DEAG, Johnson Matthey (United-Kingdom)
Maxime ELIAT, consultant for EPMF (Arche, Belgium)
Herbert FUCHS, Heraeus (Germany)
Rob GARRETT, Ames Goldsmith (United-Kingdom)
Wouter GHYOOT, Umicore (Belgium)
Daniel GLOWACKI, KGHM Polska Miedz (Poland)
Rikki GORDON, Johnson Matthey (United-Kingdom)
Sarah HOTTENROTH, Umicore (Germany) – *via conference call*
Michael HUBER, C. Hafner (Germany)
Hitoshi KOSAI, Tanaka (Japan)
Marie-Laure LEDRICH, Traxys (Luxembourg)
Jelle MERTENS, EPMF (Belgium)
Agnieszka PIECHOTA, KGHM Polska Miedz (Poland)
Clémence SIRET, SAFT Batteries (France)
Dorothea STEIGER, Heraeus (Germany)
Michael THIEL, BASF (Germany) – *via conference call*
Paul YLIOJA, Johnson Matthey (United-Kingdom)

Apologies

Steven VERBERCKMOES, Umicore (Belgium)