Metals and minerals are essential for the high-tech industries of tomorrow – ranging from solar panels to electric vehicles, smartphones and computers.

In face of fierce global competition, how can Europe secure access to key raw materials for the future of its industry?
<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breaking new ground: The EU's push for raw materials sovereignty</td>
<td>4</td>
</tr>
<tr>
<td>Daniel Caspary MEP: Raw materials 'need a sustainable deal, not a green deal'</td>
<td>7</td>
</tr>
<tr>
<td>Hazards ahead: Electric cars face battery recycling hurdles in Europe</td>
<td>10</td>
</tr>
<tr>
<td>Northvolt 'will source directly from the miners' to ensure clean supply chain</td>
<td>12</td>
</tr>
<tr>
<td>Europe's industrial value chains: The road to prosperity and growth</td>
<td>14</td>
</tr>
</tbody>
</table>
Breaking new ground: The EU’s push for raw materials sovereignty

By Laura Cole | EURACTIV.com

A new pro-mining investment policy, more free trade deals, and an incoming “geopolitical” European Commission signals the EU will stake more claim on critical raw materials.

Raw materials experts from Japan and the United States descend on Brussels this week for an annual trilateral with Europe. The conversation is likely to focus on supply risks to critical raw materials, among them those in high demand for the low-carbon transition, such as rare earths used in wind turbines, and lithium used in electric car batteries.

Though generally an informal meet, global trade tension will give the talks a more geopolitical edge. Australia, Canada and South Korea delegates have joined as observers. China, although it produces 70% of the world’s raw materials, is not involved.

“The three regions are significant net importers of critical materials, mainly, but not exclusively from China,” says Erika Faigen, an expert on global rare earths value chains based in Melbourne, Australia.

“The access to these minerals and materials will define who is in a strong position for the low-carbon transition,” she said.

Continued on Page 5
DIGGING CLOSER TO HOME

“We cannot sit idle while China is taking control of all the supply,” Šefčovič told a roomful of EIB board members last June, when he implored them to include more mining investment in the energy lending policy.

“We have identified with the Member States that there are 10 potential mining projects for lithium that, if developed, could allow the EU to move from 1 to 30% of the world production by 2030,” he said.

It appears to have worked. The bank’s energy lending policy, rubber stamped last week, is the first to include mention of critical raw materials. As the axe came down on lending to fossil fuel projects, new investment was earmarked for mining operations.

Across the member states, potential mining sites are beginning to appear. There are rare earth projects in Norway, cobalt in Finland and lithium potential in Spain, the Czech Republic and Portugal.

Public perception, however, is one of the greatest hurdles. Mining can be a hard sell to European societies, not least because the green transition has become associated with less extraction, particularly that of fossil fuels, not more.

There is a desire from the industry to try and change the narrative about mining. In a new vision paper, the European Mineral Resources Confederation (EUMICON) calls on the EU to acknowledge the raw and advanced materials sector as a “sunrise industry”.

An EU-funded project, called Mireu, is also in the process of surveying European’s perceptions of mining.

For Europe’s high-tech industries, the challenge is almost existential. “We need to be more independent on the availability of raw materials if we want not only to be able to master the transformation of our industries and business towards a low-carbon economy, but even more to keep these value chains in Europe,” said Gilbert Rukschio, managing Partner of Pantarhei Advisors, a consultancy advising clients in raw materials strategy.

But even if new mining sites are opened, a major question is how they can compete against cheaper imports from abroad, notably China and Africa.

“That’s the million dollar question,” says Fijan. The EU’s environmental regulations such as Natura 2000 protection areas, Birds and Habitats Directive, the Water Framework Directive and biodiversity regulations require European raw materials companies to jump through higher hoops at greater cost.

“What we really need to get is markets that value these aspects, rather than just the cheapest materials,” an EU source told EURACTIV. “There is a whole market-creation side of this, which we are trying to address in the industrial strategy.” The new industrial strategy will arrive alongside the new critical materials list in spring 2020.

A NEW ‘GEOPOLITICAL’ COMMISSION

In the time it takes for new mines to come online, the EU is on the lookout for critical resources outside of its borders. And the question remains: how can Europe secure raw material sovereignty without making environmental or social trade-offs somewhere down the line?

New Commission President Ursula Von der Leyen has signalled it will be through the Union’s trading clout. In her mission letter to incoming trade Commissioner Phil Hogan, she said trade agreements could “incentivise” other countries to higher standards outside of its own jurisdiction.

Continued on Page 6
In other words, the EU could use its trade policy leverage to get better environmental and social results abroad. “This is where the ‘geopolitical commission’ could come into play,” says an EU source.

The argument has already been used in defence of the Mercosur deal which advocates argue will pressure the South American countries involved to maintain the requirements of the Paris Agreement on climate change. Critics, however, point to the fallout over last summer’s Amazon wildfires as proof that trade leverage has limited effect.

When it comes to critical raw materials, the Commission is exploring fair trade agreements with Australia and Chile, which produce sizeable amounts of lithium, among other minerals. The Canada-Europe CETA free trade agreement, which is now almost entirely in effect, was identified by German industries as a boon for sourcing nickel and rare earths.

In her letter to Hogan, von der Leyen identified a continent-to-continent free trade agreement with Africa as a priority. With significant reserves of critical raw materials such as cobalt and platinum metals, a deal could be a potential game-changer for European industries.

The new commission also seems intent on a more assertive stance at the World Trade Organisation. Since 2016, the EU has launched assertive WTO disputes against Chinese export restrictions of materials such as cobalt, chromium and graphite.

One of Hogan’s top priorities is for reform of the dispute settlements mechanism. In his inauguration hearing, he announced a new initiative within the next year.

Vying for a level playing field, EUMICON supports the WTO reforms. “We need to strengthen our trade mechanisms, including the EU enforcement mechanism, in order to combat sanctions imposed by third countries,” says the European Mineral Resources Confederation.

**SUSTAINABLE SUPPLY CHAINS**

Resource efficiency is another key pillar of the EU’s raw materials strategy. The upcoming European Green Deal is likely to include incentives to make raw materials life cycles more circular.

“First, a robust system to collect, sort, recycle and reuse recycled raw materials must be at centre of the EU strategy,” said Green MEP Anna Cavazzini who follows raw materials policy in the European Parliament.

“Products must be repairable and have a longer use time by design, in order to maximise resource efficiency. This of course must apply to renewable technologies,” she said.

The decade lifecycles of technologies such as wind turbines will mean there is a delay before they become available through recycle streams. In the meantime, if Europe continues to rely on imports for critical raw materials, there is set to be greater scrutiny of companies’ supply chains.

Within a year of the new Commission, the conflict minerals regulation for tin, tungsten, tantalum and gold – or ‘3TG’ – will also come into place. Under its requirements, large European companies that import above a certain threshold of the four components are currently preparing mandatory due diligence of their supply chains.

For all materials, the EU is due to release a toolkit to help companies, particularly small and medium enterprises, fulfil diligence under the guidelines of the Organisation for Economic Co-operation and Development (OECD).

Apart from the four conflict minerals, due diligence for minerals remains voluntary, however. “New legislation is badly needed on this topic, at EU, national and international level,” Cavazzini said.
Daniel Caspary MEP: Raw materials ‘need a sustainable deal, not a green deal’

By Laura Cole | EURACTIV.com

A sustainable deal would tackle not only CO2 emissions but also the social and economic development of Europe and the countries where raw materials are mined, says centre-right MEP Daniel Caspary.

Daniel Caspary is a German MEP from the centre-right European People’s Party (EPP), affiliated to Angela Merkel’s CDU. He is a member of the European Parliament’s Committee on International Trade and chair of the Delegation for relations with the countries of Southeast Asia and the Association of Southeast Asian Nations (ASEAN).

He spoke to EURACTIV’s Laura Cole.

Are critical raw materials high on the European Parliament’s agenda at the moment?

For the trade committee and development committees it is an important topic, but elsewhere it is not recognised as a top priority. The difficulty with raw materials is that prices always go up and down. At the moment the prices are down so it seems everyone else except the European Commission have forgotten about it a bit.

When prices shot up in 2011, and the price of oil was high, it came to everyone’s attention. But even from industry it seems there is less interest than a few years ago. It’s good that the Commission is working on this issue but most of the MEPs are not aware. This is a newly-elected Parliament and...
it has not been an issue yet. That being said, the prices will one day be high again. We don’t know for which raw materials and when but for a sustainable business case perhaps it would be better to be aware of it.

Keeping to a 2°C global warming scenario will mean a 1,000% increase in demand for battery metals, according to the World Bank. Do you think there is recognition of the raw materials the transition technologies require, and how most efficiently to use them?

No, there is not a link yet. Look at the young people in our market places at the moment. They are asking for decarbonisation in Europe but only a few are asking who will have to pay the price and where. And more importantly, how we avoid paying that price.

The Greens and the socialist side of the Parliament have a green agenda, and that is greening Europe as soon as possible. Their focus is on greening it, not so much taking care of the workers in the companies or the supply chains down the line.

What does it mean for a worker in a German car producing company for example? As a big conservative party we are often criticised for ‘greening too slow’ but we are trying to keep the workers in their companies.

How can a German worker buy an electric car if he doesn’t have a job anymore? Would perhaps a longer transition be more sustainable in the long run?

A problem, I think, is too many people talk about a Green Deal or a Green transition. It has to be a sustainable deal, not a Green Deal. If you only focus only on one issue, it’s perhaps wrongly designed.

Can you explain further what you mean by a sustainable deal?

A sustainable deal would be one that not only tackles climate and CO2 emissions but also the social and economic developments in Europe as well as the social development in those countries where the raw materials come from. That is, the environmental pressures on countries outside of the European union.

It is true, The Green Deal looks nice when we bring down the CO2 emissions in Europe. But is it sustainable if decreasing CO2 emissions in Europe goes together with growing CO2 emissions in China due to carbon leakage? Or causing deforestation in Asia because we use more palm oil for renewable energy production?

Last year, EU Energy Union Commissioner Maroš Šefčovič warned that raw materials risked becoming the new oil. Is having a diverse supply, or moving dependence away from China, a priority for the Parliament’s trade committee?

I think we should not fight against anyone in particular. The problem is not China, the question is how we can find more sources for raw materials. And what is our offer to those countries in return. How do we set up again a sustainable European policy for some African countries or central Asian countries who have them.

Do I think there will be a supply issue? I think as long as we let the markets work, I am quite optimistic.

How could they work better?

Let’s take for example a European company that wants to invest in Mongolia for a gold mine. There are difficulties for them. We now have legislation that means European export agencies have to keep to OECD regulations concerning transparency and environmental impacts.

The Greens and the left now say the OECD is not enough, that we have to put higher standards on our companies. But if a Chinese investor comes and says “I can invest in this mine, for more money, with much less regulation”, does it really help anyone?

Our priority should be addressing the issues on the ground and not only do something to look nice and helps us to sleep well in Europe.

Do you have suggestions when it comes to helping people on the ground, as you say?

First of all, I think a European investment would be better than a Chinese investment, even it doesn’t stick to all of our European legislation.

If we hinder European investment because of our high standards, it is nice to show to everyone our high standards. But on the other hand, the European investment doesn’t take place at all. Other countries will fill those vacuums, often with worse standards.

Continued on Page 9
Is it possible to compete against China without forgoing the human rights and environmental standards?

First of all, we should accept that not everyone at anytime in any country can meet those standards from the first day.

That is a very difficult message for us as Christian Democrats from Germany. When the 3TG [Tungsten, Tantalum, Tin] legislation was created, I had so many contacts with representatives from churches or NGOs who told us it was not tough enough, or that we were blocking and not doing enough.

I said, “yes we are blocking, because at the moment we are doing too much”. I told them they were right, it is not tough enough. There is a problem on the ground and we have to address it.

That being said, what we can see is some small sized companies have already closed down because they aren’t able to meet our European standard. We see that family companies and family mining for instance in Congo will be much more difficult because these small families are not able to fulfil our standards.

So they closed down their mines, or sold them to the big companies and now there are fewer smaller enterprises. I would argue, in most cases, that this is not an improvement.

The question is not whether there is nice-looking legislation on the European side but whether it really helps make supply chains more sustainable. With too much legislation we will get the opposite of what we want, which is the improvement of conditions in those areas.

That is especially relevant to the raw materials area. Sometimes it is better to ask for less than ask for the right thing but too early and too much. Everything in life is about timing.

Do you believe it is too ambitious for EU trade of raw materials to work within the guidelines of the OECD?

I would ask, do we do things within the OECD or do we do things on our own? I would prefer doing something that is less ambitious on the OECD level than doing something more ambitious but creating different standards to the companies operating in those regions.

For a big global company it is not a problem to fulfil different standards in different parts of the world. But for a small and medium sized company it is difficult. This is why we tried to make a difference between big and small companies, with the threshold.

When we negotiate trade agreements at the moment, we are always pushing for a sustainability chapter. My main question is how do we strengthen the sustainability chapter without creating a hurdle that is too high for small and medium businesses to jump over?

Should that be voluntary or mandatory?

Not voluntary, but with clear thresholds, clear timetables and phasing periods instead of a sudden change. In that way, de facto we help people more.

When I listen to my colleagues from the Greens I often think I could subscribe to almost all of their arguments. We think alike.

But we should reach it step by step. We shouldn’t set up a hurdle that only the big ones can jump over. That’s generally the EPP approach – better slower than never.

The non-financial reporting directive makes it mandatory for companies to report their actions on social and environmental challenges. This summer, the Commission released non-binding guidelines on reporting for climate too. Do you believe this could clean up raw materials value chains?

To have the reporting mandatory in this field is good because it raises awareness. It makes company boards realise that they have to deal with the issue.

The question is what do you do with the report, what solutions do you draw from them. If we come down too hard and fast with a solution, where for instance, a company closes down production sites in one area and then we have a disinvestment somewhere, then the question of sustainability begins.

We have to balance this out, which is sometimes missing from this debate at the moment.

Let’s talk about CO2 leakage for instance. We see it taking place, we see it every day. We see that there are some sectors where investments in Europe move away. Does it help anyone if we lose the jobs and the emissions continue to exist?

[This interview has been edited for length and clarity]
Hazards ahead: Electric cars face battery recycling hurdles in Europe

By Laura Cole | EURACTIV.com

European recyclers have called for changes to EU regulations on hazardous metals and waste shipment that “sometimes stand in the way” of a fully European electric car manufacturing value chain.

For a European electric vehicle battery, life could begin in a lithium mine in northern Portugal. The metal could be sandwiched between cobalt cathodes from Finland at a ‘gigafactory’ in Sweden before being transported to a car factory in Slovakia.

If the European Battery Alliance achieves all of its ambitions, the continent-wide journey would be one of the possible future supply chains for a 100% European electric car battery.

Launched two years ago as an eleventh-hour attempt to compete with the Asian battery industry, the EBA wants to go big on electric cars for Europe. With talk of 10 ‘gigafactories’ needed by 2030, and the possibility of an ‘Airbus-style’ industrial pact, one thing is for certain – the electric vehicle supply chain will be full of metals.

European battery recyclers are beginning to test-run these chains. But “EU regulations can sometimes stand in the way,” said Jan Tytgat, from Umicore, a Belgian materials technology company which is now the world’s largest recycler of precious metals.

Namely, the metals required are beginning to hit snags in the EU’s chemicals legislation, REACH, which covers hazardous substances across the member countries.

In a letter to the European

Continued on Page 11
Commission, Eurometaux, the metals industry association, called out the EU’s “conflicting signals” on the issue.

"While our products are praised for their contribution to circularity, the hazard classification of many of our metals and their unavoidable presence across different recycling streams would make it harder rather than easier to use as secondary materials,” they wrote.

The substances in question are cobalt and nickel, lead compounds and cadmium. They are included on REACH because exposure to them can be toxic to people and the environment.

Chris Heron, Communications Manager at Eurometaux, says “the reality of batteries and metallurgy is that hazardous metals are necessary”.

The industry wants to avoid of further restrictions or outright bans on battery metals.

Heron says the metals association is asking for a “proportionate” regulation, which focuses on measures in the workplace as the only place where there is a risk of exposure.

**TRANSPORT OF HAZARDOUS WASTE**

A parallel challenge is the transport of the metals between member states, en route to being recycled. The problem for the recycling industry is that some EU countries see the battery metals as hazardous, while others do not.

Imagine the battery – now locked up in a car – finishes up in Lithuania. To reach a recycling plant in Belgium, for example, it will need to cross multiple borders.

According to Heron, different rules across EU member states about the transit of hazardous waste “already mean it can take anything from several weeks to a year for the necessary approvals to allow those shipments to reach the recycling facility”.

“This is really a topic that is becoming more and more of a burden," Tytgat said at a recent EURACTIV event.

A solution, posited by the industry, is to introduce a ‘fast-track’ under the Waste Shipments Regulation. The idea is to have big-name recyclers such as Umicore audited by member states so that they get quicker transport of hazardous waste.

“The point is not to reduce scrutiny on hazardous waste shipments, it is to optimise the process for these companies with a good track record,” said Heron.

The Commission has motioned that it plans to make moves on the issue and plans to review those rules as part of its upcoming circular economy action plan.

"About waste shipment, we will review it," said Kęstutis Sadauskas, Director for circular economy and green growth at the Commission's environment directorate.

"In fact, I already have the draft of the review," he added, saying the new rules will allow waste shipment to take place across borders “so that it goes around just like any other product.”

The shift to a model more reflective of the China’s lithium-ion cycle, where recycling is seen less a subject of waste disposal than as a potential resource.

“In a sense, China has already achieved the circular economy we are talking about in the West,” says Hans Eric Malin, an expert in batteries second life. “Here, the motivator has been to get rid of our waste in a responsible and sustainable way, in China, the driver for recycling is materials, materials, materials”.

“That perspective is more important than any technological advancement,” he added.

Sadauskas warns, however, that cohesion across the member states could be a barrier to changes on waste rules. He said the proposal was likely to “face major resistance” from EU member states when it reaches the EU Council of Ministers.

‘Member states don’t want to let go the control,” he said. When it comes to waste regulation, “they don’t trust each other,” he told participants at the EURACTIV event.
Northvolt ‘will source directly from the miners’ to ensure clean supply chain

By Laura Cole | EURACTIV.com

A short supply chain “will make it possible for us to trace our materials” and ensure they come from responsible sources, said a senior executive at Northvolt, the Swedish startup aiming to supply Europe with green electric batteries.

“We need to be very cautious about the choices we are making today,” said Emma Nehrenheim, Chief Environment Officer at Northvolt, during an EU debate about supply chain transparency in Brussels.

“Neverthless it is incredibly important we move fast,” she told participants at the European Commission’s annual Raw Materials Week event on Wednesday (20 November).

Her comments addressed the paradox for companies with even the greenest intentions. As it stands, manufacturing clean, fossil-free technology depends on a closed-off and potentially exploitative supply chains of raw materials.

Cobalt is probably under the most scrutiny. In 2016, an Amnesty International report sent tremors through the tech industry when it revealed that 35,000 child labourers worked cobalt mines in the Democratic Republic of Congo, the major source of

Continued on Page 13
A failure of technology companies to monitor supply chains meant they could not deny the presence of the incriminated substance in their products.
Cobalt, alongside lithium and rare earths are the metals with the highest potential to cause environmental or social damage, according to analysts. The three are important components in smartphones, laptops, electric vehicles, batteries and wind turbines.
Northvolt, founded in 2017, and now readying its gigafactory in Skellefteå, vows it “will not compromise in any way”.
“Don’t think that the mining operations in the DRC are the only problems we are facing,” said Nehrenheim. “There is a whole bouquet of labour rights, social rights, human rights and environmental rights that we need to track down,” she said.
For the startup, the solution has been to shorten supply chains. Nehrenheim says Northvolt will source directly from the miners, which will make it easier to trace materials. The company also has plans to bring cathode manufacturing under its thumb. “We are looking for ways to bring the graphite production to Europe,” she explained.
It is an unusual move in the tech industry, which is often separated from mining by a long and complex supply chain. “Some large multi-national enterprises have as many as 200,000 suppliers” said Mathilde Mesnard, Deputy Director for Financial and Enterprise Affairs at the OECD.
According to Mesnard, the ongoing challenge is that “not all the stakeholders have a genuine interest when it comes to fostering transparency”. She adds that voluntary schemes to trace raw materials through the supply chain “only go so far”.

In Europe, there are signs public expectation of green technology is filling some of the gap. Nehrenheim says she already sees this at Northvolt. “Our customers are not interested in greenwashing of any kind – they want us to do it right from the beginning,” she said.
Rising public expectations for raw materials supply transparency is also having an influence on EU bodies. An EU Commission-funded project run by a consortium of 10 organisations, called “Make ICT Fair”, aims to wield the EU’s purchasing power for the good of the electronics supply chain.
“Over 250,000 EU public authorities such as universities, hospitals and cities spend tens of billions in electronic devices every year,” says Kim Claes, Project Coordinator at Make ICT Fair. The total between them gives the EU’s public bodies together considerable leverage.
While no smartphone or laptop yet on the market can trace the origin of all its raw materials, “we try to support the public procurers to ask for higher standards of their suppliers, and get the conversation going” says Claes. The logic being, that if enough public bodies demand higher transparency standards, tech companies, and their suppliers in turn, will begin to raise them.
For Mesnard, public procurement is an “important” method to explore.
This year marks a major transition period in Brussels: the newly elected European Parliament took office in July, the next College of Commissioners will start its work at the end of the year, and the European Council has a new leadership.

New policy priorities are set along with the institutional changes, with the digital transformation and the European clean energy transition topping the institutions’ agenda. Commission President elect Ursula von der Leyen announced a firm commitment to establish a European Green Deal in the first 100 days of office to enshrine the proposed European 2050 climate-neutrality target into law.

Roman Stiftner is Secretary General of EUMICON, the European

Continued on Page 15
In light of increasing global competition and the threat of the European industry falling behind, urgent questions arise: what is the five-year outlook of the EU’s industrial agenda? Which priorities and measures will be central to the strengthening and continuous improvement of the European industry’s competitiveness and furthermore, to the establishment of a European Green Deal?

In recent years, economic uncertainty is constantly growing: the current economic downturn coupled with rising distortions in global competition and imbalances in the functioning of the world market pose a serious threat to European industries. In light of asymmetrical conditions of competition and anti-competitive behaviour, such as increasing imports at dumped prices from the Chinese market and corresponding excess capacities distorting the global market, it is crucial to establish a level playing field for the entire industrial value chain in Europe and the involved companies.

In the immense challenge of deploying green technologies and expanding the use of renewable energy, strengthening the technological revolution, and further developing artificial intelligence and the internet of things, raw materials will become indispensable given their crucial function to nearly all technologies which are required for Europe’s digital transformation and climate transition.

Therefore, it is essential for Europe to considerably foster and preserve the competitiveness of its own industrial value chains. This is necessary not only from an economic perspective in order to strengthen European companies’ competitiveness and secure and further create jobs, but also from an environmental perspective. Promoting European industrial value chains plays a crucial role in the achievement of EU-wide and global climate and sustainability goals given that the production and processing of raw materials within Europe leads to a reduction in CO₂-equivalent emissions, as compared to third countries. In fact, according to a recent study conducted by the Austrian Federal Economic Chamber, 1 ton of additional emissions in Europe resulting from increasingly processed intermediate products leads to average global savings of 1.24 tons of CO₂-equ in all material sectors.

It is vital to develop and deploy green technologies and innovations, such as to reduce overall energy consumption, while at the same time ensuring secure, sustainable and - in particular - competitively priced energy for industries. Therefore, EU energy policymakers need to develop green regulatory measures which go hand in hand with the European industry to avoid jeopardising the latter’s global competitiveness.

Our lately developed Common Vision, drafted through the contributions of stakeholders along the entire industrial value chain, is a remarkable example demonstrating EUMICON’s role as a proactive player in the promotion of European industrial value chains that is well aware of the importance of cross-sectoral and overall cooperation with policymakers. This set of positions contains a wide range of policy recommendations, like e.g. the introduction of specific policy key performance indicators in order to monitor the implementation of policies and their impact on sustainability and efficiency from a holistic perspective; or the establishment of an ambitious research, development and innovation (RD&I) programme that addresses the main challenges facing the shift towards competitive, low-CO₂ processes in energy-intensive industries.

We consider the multitude of current challenges that affect the European industrial location as a unique opportunity to create a new mindset of ensuring prosperity and societal progress. As a proactive representative of the raw material and mineral value chain, we firmly believe in promoting and symbolising the harnessing of European excellence, thereby effectively contributing to the incoming Commission President von der Leyen’s ambition to “promote the European way of life.”
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