

Extractives for Development Newsletter



Information on current topics and trends in the extractives sector

A service of GIZ project Extractives and Development

Dear readers,



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Welcome to the English issue of our extractives newsletter!

Every month, the Extractives for Development (X4D) Sector Programme sends you a selection of articles and links that may be of interest to you. We would like to inform you about key developments in the sector and draw your attention to new findings. If you find additional topics interesting or have event information for us, please do not hesitate to let us know so that we can include them in our newsletter!

Sincerely,
your X4D Sector Programme

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- » European Conference of the Responsible Business Alliance (RBA)
- » EPRM Members Meeting
- » DMT Mining Forum 2022

DID YOU KNOW...?

- » ...that June 15 is International Day of Women in Mining?

Extractives and Public Finances

MinSus and ECLAC webinar about “Fiscal regimes in the lithium triangle”

Lithium stands among the most important minerals for the energy transition. The prices have skyrocketed in the last years, and new investments are announced in different jurisdictions. In South America, the so called “Lithium triangle” concentrates important reserves of this mineral. The triangle is defined as a zone between Argentina, Bolivia, and Chile. Besides its big potential, there are questions regarding the lithium markets and the fiscal regimes in each country. MinSus and its regional counterpart, the Economic Commission for Latin America and the Caribbean (ECLAC), have developed a comparative study of the fiscal regimes for lithium in each country. The results have been discussed with officials of each country, and space for fiscal coordination between countries were identified.



© MinSus

[To the study and webinar »](#)



Responsible Raw Material Supply Chains

Interview with the EPRM Chairs 2022: Marcin Piersiak and Lotte Hoex

At the beginning of every year, the European Partnership for Responsible Minerals (EPRM) chair

rotates. In 2022, the EPRM has two chairs who are both active part of the year: Marcin Piersiak and Lotte Hoex. Marcin is chairing the EPRM in the first half of the year and Lotte the second half of 2022. Marcin Piersiak heads the European chapter of Alliance for Responsible Mining, a NGO headquartered in Colombia that promotes responsible artisanal and small-scale mining. Lotte Hoex works for the research institute International Peace Information Service (IPIS). In the interview, the two chairs share when and how they got involved with the EPRM, why they became the organization's chair, what their ambitions for their chairmanship are, and where they see the EPRM's potential.

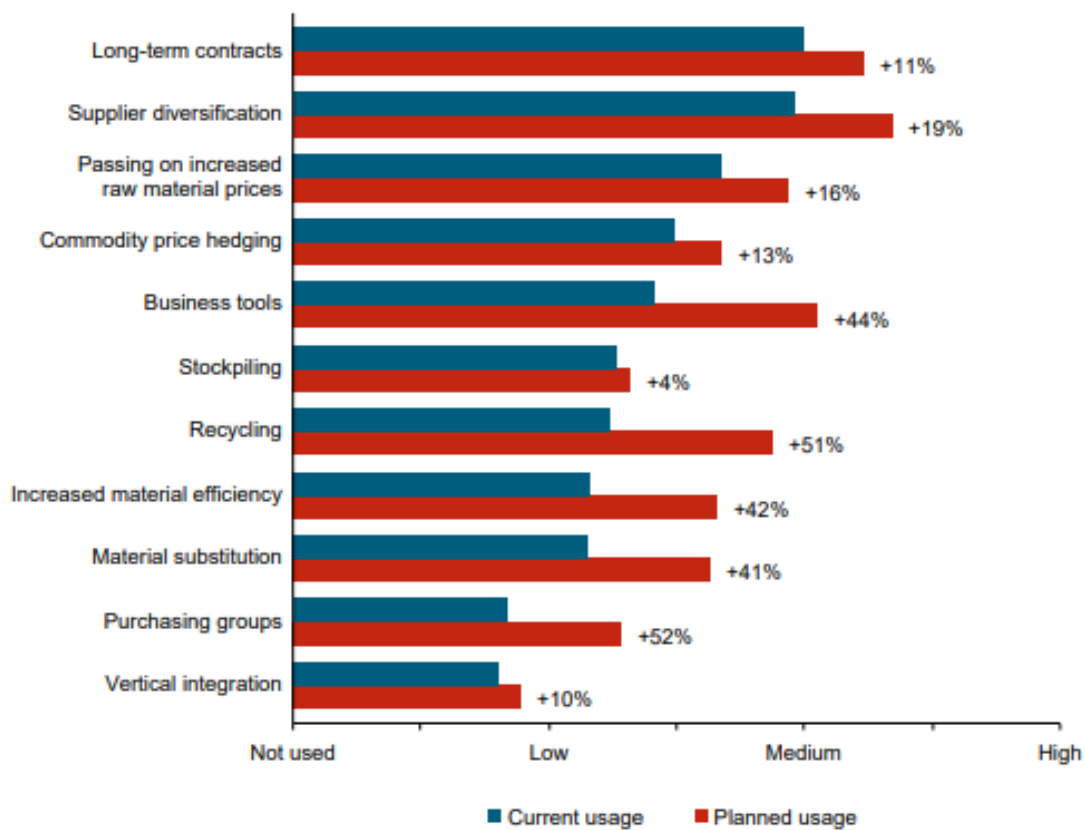
[To the interview »](#)



Extractive Economies

New DERA Study: Securing Raw Material Supply

Benchmarking of measures of foreign manufacturing companies and recommendations for action



© DERA

The aim of the study conducted by the German Mineral Resources Agency (DERA) was to analyze how companies outside Germany secure their supplies of raw materials, which strategies they currently use and plan to use in the future, and which opportunities and challenges are associated with these strategies. Based on this analysis, the study then identifies success factors and recommendations for action for German companies. Overall, the companies surveyed are planning to increase their usage of all eleven strategies over the next three to five years. The issue of reliable raw material procurement has become more relevant in the companies surveyed. They are planning to increase their focus on raw material strategies to ensure a reliable supply of materials and mitigate price risk. The DERA presumes that increasing globalization and a simultaneous increase in focus on domestic raw materials is expected to increase the complexity of raw material markets. Markets might become more interconnected in the future, but individual states may also increase

their efforts to protect local sources of raw materials. The current and planned usage of strategies for securing raw material supplies in the companies surveyed is summarized in the graphic.

[Find out more »](#)

New ASEAN Report: Strengthening ASEAN Cooperation in Minerals

Development Prospects of ASEAN Minerals Cooperation (DPAMC)

This Report on Development Prospects for ASEAN Minerals Cooperation (DPAMC) is the result of research, analysis, consultation, and stakeholder comment between October 2020 and August 2021. The mineral sector is a major economic contributor to ASEAN Member States (AMS), many of which are rich in mineral resources. AMS will have to confront the challenge of ‘complex orebodies’, a term that refers to the complex and challenging contexts that companies and governments must face as high-grade orebodies become increasingly scarce globally. If AMS can attract investment in all stages of the minerals value chain, they will be well-placed to supply increased volumes of traditional minerals and additional types of mineral products being demanded by markets. The findings of this study support continued prioritization of existing ASEAN Minerals Cooperation Action Plan strategic focus areas, the implementation of which is overseen by the four ASEAN Minerals Working Groups:

- Boosting investment, production, and trade in minerals
- Driving sustainable minerals development
- Building capacity in minerals governance
- Providing high quality information about minerals

[Access the report here »](#)



© ASEAN

How Russia's Invasion of Ukraine might impact Africa's Energy Transition

The Council on Foreign Relations (CFR) examines in a blog post, how Russia's invasion of Ukraine might impact Africa's energy transition. To date, most of the attention has focused on European energy security and how the crisis might shape the region's decarbonization plans. But the energy sector-impacts of this war will reverberate across every corner of the globe. CFR outlines seven ways it could impact Africa's energy transition:

- African leaders will increasingly frame energy poverty as an energy security issue deserving the same urgency.
- The rush to boost LNG supply to Europe (and sudden shifts in U.S. and European rhetoric) will stoke further African frustration with climate hypocrisy—unless development finance follows through.
- Rising oil and gas prices will hurt the African electricity market.

- Rising interest rates will create headwinds for renewable projects.
- The need to diversify away from Russia will reinvigorate interest in African oil and gas production for export.
- As the urgency behind decarbonization intensifies, demand for critical minerals will spur investment in African mining.
- Russian actions (and Western financial sanctions) could give countries pause about betting on Russian nuclear technology.

[To the blog post »](#)

MinSus and ECLAC online course about lithium

Governance, global production networks, and sustainability of this strategic resource

The Economic Commission for Latin America and the Caribbean (ECLAC) and MinSus have developed an online course covering different aspects around lithium exploitation, trade, and markets. The course consists of six modules and will be held between May 30th and July 8th. For this first version, 45 officers from public institutions of Latin American countries were invited to take part. The launch session took place on May 30th.

Mapped: The 10 largest Gold Mines in the World, by Production



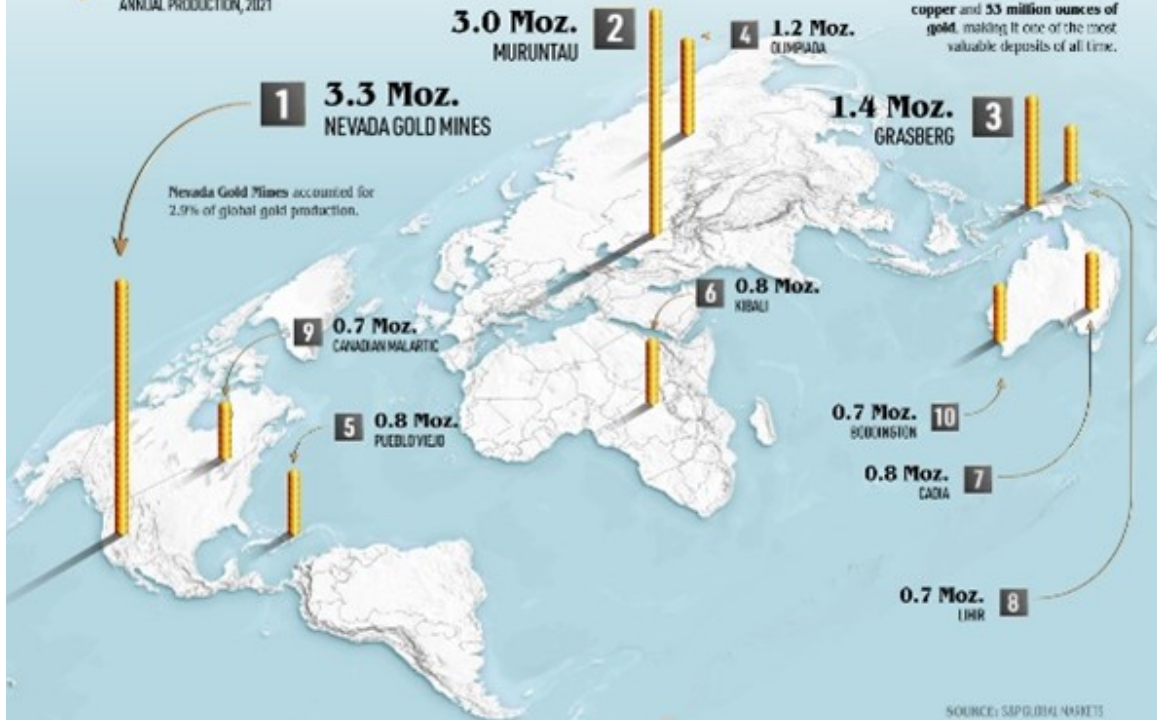
Mapping the World's Top 10 GOLD MINES

The world produced an estimated 3,561 tonnes of gold in 2021.

Which gold mines were at the forefront of production?

100,000 OZ. OF GOLD ANNUAL PRODUCTION, 2021

Since 1990, **Grasberg** has produced more than **33 billion pounds of copper** and **53 million ounces of gold**, making it one of the most valuable deposits of all time.



SOURCE: S&P GLOBAL MARKETS INTELLIGENCE, COMPANY REPORTS

Top Gold Mines by 2021 Production

Newmont

Newmont was the top producing gold miner in 2021 with more than 5.9 Moz across all their projects.

BARRICK

Barrick was the second-largest global gold producer in 2021, mining 4.4 Moz.

| Rank | Country | Mine Name | Production (Million Oz.) | Owners | Operator |
|------|------------------|-------------------|--------------------------|----------------------------------|----------------------------------|
| 1 | U.S. | NEVADA GOLD MINES | 3.3 | BARRICK, Newmont | BARRICK |
| 2 | UZBEKISTAN | MURUNTAU | 3.0 | NAVEMINING & METALLURGI COSENKAT | NAVEMINING & METALLURGI COSENKAT |
| 3 | INDONESIA | GRASBERG | 1.4 | Freeport-McMoRan | PT FREEPORT INDONESIA |
| 4 | RUSSIA | OLIMPIADA | 1.2 | POLYUS | POLYUS |
| 5 | DOMINICAN REP. | PUEBLO VIEJO | 0.8 | BARRICK, Newmont | BARRICK |
| 6 | D.R.C. | KIBALI | 0.8 | BARRICK, ANSGOLD ASHANTI | BARRICK |
| 7 | AUSTRALIA | CADIA | 0.8 | NEWCREST MINING LTD | NEWCREST MINING LTD |
| 8 | PAPUA NEW GUINEA | LHR | 0.7 | NEWCREST MINING LTD | NEWCREST MINING LTD |
| 9 | CANADA | CANADIAN MALARTIC | 0.7 | YAMANA GOLD, AGNICO EAGLE | MINE CANADIAN MALARTIC |
| 10 | AUSTRALIA | BOODINGTON | 0.7 | Newmont | Newmont |

ELEMENTS

ELEMENTS.VISUALCAPITALIST.COM

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Gold mining is a global business, with hundreds of mining companies digging for the precious metal in dozens of countries. But where exactly are the largest gold mines in the world? The above infographic uses data compiled from **S&P Global Market Intelligence** and company reports to map the top 10 gold-producing mines in 2021. The 10 largest gold mines are located across nine different

countries in North America, Oceania, Africa, and Asia. Together, they accounted for around **13 million ounces** or **12%** of **global gold production** in 2021.



Extractives and Environment

PtX Report: Sustainability – Dimensions and Concerns

In its new publication, the PtX (power to x) Hub analyses key challenges in the transition towards a climate-neutral, defossilized economy and society. The key messages of the report are the following:

■ Key environmental messages

- PtX production, transport, storage, and trade have manifold environmental implications. They should be carefully analyzed in systematic risk assessments and environmental impact assessments (EIAs).
- How inputs to PtX production such as water, land, and minerals are sourced and managed is extremely important for assessing the sustainability of PtX projects and processes and products.



© PtX Hub

■ Key economic messages

- PtX production and trade should contribute to improving economic prosperity and well-being. Leap-frogging potentials should be tapped.

■ Key social messages

- The transformation of the energy systems and the introduction of new technologies like PtX always have major social implications.
- This is not just a transition. It must become a “Just Transition”.

■ Key governance messages

- National and international standards and certification schemes should provide proper regulatory frameworks for ramping up PtX markets and trade.
- Clear policy commitments, empowerment, and participation of stakeholders are essential.

[Read the report here »](#)



Battery raw materials

How are the costs for electric vehicle battery cells distributed?

The Visual Capitalist published a cost break down of an electric vehicle battery cell. Since 2010, the average cost of lithium-ion batteries has declined by 89%. In 2021, the average cell cost was \$101/kWh. With 51%, the cathode makes up the largest part of the total cost, followed by

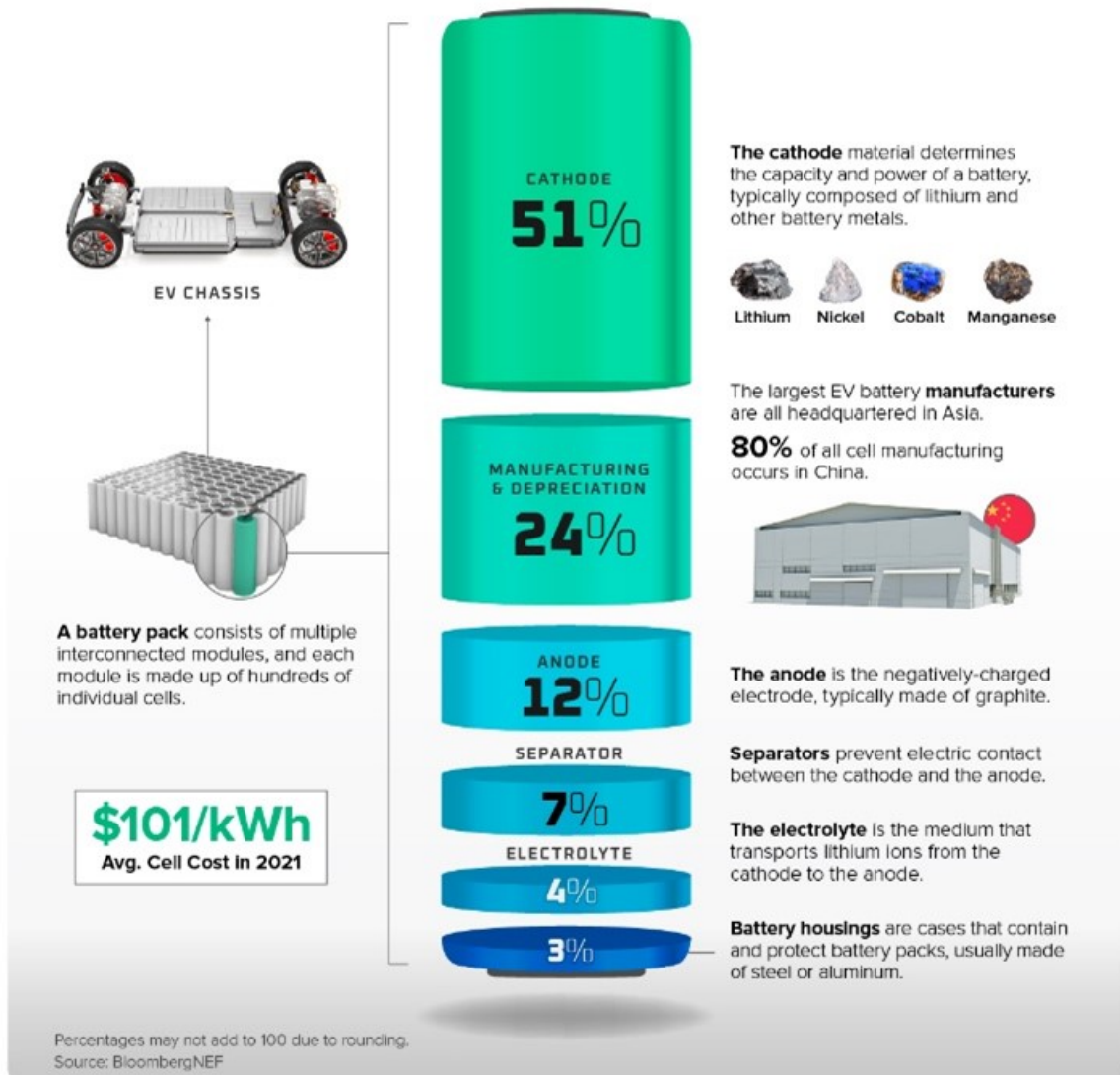
manufacturing and depreciation with 24% and the anode with 12%. Have a closer look at the graphic to find out further details about the cost break down!



Breaking Down the Cost of an EV BATTERY CELL

The average cost of lithium-ion batteries has declined by 89% since 2010.

What makes up the cost of lithium-ion cells?



ELEMENTS

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IRENA: Technical Paper on Rare Earth Elements

Critical Materials for the Energy Transition

The rare earths elements (REE) are a group of 17 chemical elements, several of which are critical for the energy transition. While conventional energy also relies on rare earths, the mix of energy-relevant REE that are needed going forward differs from the past. This technical paper examines demand and market growth projections for electric vehicles and wind turbines and explores the efficiency of rare earths' use. It pays special attention to patent activity in magnets around the world. On the supply side, it explores:

CRITICAL MATERIALS FOR THE ENERGY TRANSITION: RARE EARTH ELEMENTS

TECHNICAL PAPER 2/2022
BY DOLF GIELEN AND MARTINA LYONS

© IRENA

[Access the paper here »](#)

the outlook for the mining and processing of REE; current costs and their implications; and approaches to enhance the security of rare earth elements supply. The paper also delves deeper into the opportunities that innovation can play in reducing dependency on rare earths and discusses related policy implications.



Extractives and Human Rights

Update of the Transition Mineral Tracker for 2021

Global analysis of human rights in the energy transition

The Business & Human Rights Resource Centre's **Transition Minerals Tracker** is updated annually to monitor the human rights policies and practices of companies mining six key commodities vital to the clean energy transition: **cobalt, copper, lithium, manganese, nickel** and **zinc**. This global update analyses allegations of abuse from 2010 to 2021 and provides a snapshot of 2021 data.

These are the key findings of the tracker-update:

- The Tracker has identified a total of **495 allegations** of human rights abuse from 2010 to 2021.
- In 2021, the Tracker identified **61 new allegations**.
- One-third of allegations represent **attacks against human rights defenders (HRD)**, making this the number one impact recorded in the Tracker, followed by **water pollution**.
- One-third of attacks against HRDs are against **Indigenous peoples**.
- Over two-thirds of all recorded allegations include **just 12 companies**, which are among the largest and most well-established of the extractive sector. This includes Grupo México, Codelco, BHP, Anglo American, and Glencore.

[More details »](#)

MinSus report on operational-level grievance mechanisms in the Andean Region

Between August 2021 and January 2022, the MinSus Program developed a report analyzing and comparing operational grievance mechanisms of mining companies in

Bolivia, Chile, Colombia, Ecuador, and Peru. The report also identifies persistent challenges and critical knots in their access and effectiveness with a view to their improvement through recommendations for companies, States and civil society. Operational mechanisms for addressing complaints and grievances are an essential tool in the social management of mining and in the process of preventing, addressing and remedying the potential impacts generated by the activity on human rights. These mechanisms have



© GIZ/MinSus

been established with varying degrees of complexity and integration into their business strategies by companies in the sector in the region, but strong process has been in the last decade of action of the United Nations Guiding Principles on Business and Human Rights (UNGPs). The study also includes a Catalog of 18 leading practices of the operational grievance mechanisms of several mining companies in the Andes. These leading practices are more complete than the average of their peers for one or more of the effectiveness criteria set out in Principle 31 of the UNGPs and the internal management criteria. These effectiveness criteria call for operational grievance mechanisms to be legitimate, accessible, predictable, equitable, transparent, rights-compatible, be a source of continuous learning, and be based on engagement and dialogue. The study will be relevant for several companies in the industry, of different scales, to develop and strengthening their own operational mechanisms. This is even more relevant today, considering the growing expectations on environmental, social and governance issues from investors, consumers and citizens, where stronger and more effective grievance mechanisms for citizen participation and relations are required to minimize the potential impact and social risk of the mining sector, commonly associated with conflicts, but essential to the economy of the Andean countries. On May 24th a webinar took place to launch the report. Representatives from the mining sector met to analyze the progress and pending challenges of mining operational grievance mechanisms in the Andean region. The activity was sponsored and attended by three of the main mining associations in the region, the National Society of Mining, Petroleum and Energy of Peru, the Colombian Mining Association, and the Chamber of Mining of Ecuador. Representatives from mining companies such as Rio Tinto Exploraciones, Cerrejón, Lundin Gold Ecuador and Compañía Minera Antapaccay also shared their experiences and leading operational grievance mechanisms

- » [Executive summary in English](#)
- » [Full report \(in Spanish\)](#)
- » [Catalogue of leading practices \(in Spanish\)](#)



Extractives and Gender

How women can improve the environmental performance of the minerals sector

We should no longer see women only as victims, but we must recognize that they are already organizing themselves in large numbers to stand up for their rights and interests. It is time to give women the right platform as well. Women are disproportionately affected by the impacts of climate change and environmental degradation, especially in the mining sector. Yet, their role in the fight against environmental degradation is often overlooked. Mining companies need to involve women more, including in their plans to empower local communities. This is the only way they can retain their social license to operate in the long run. For example, women could assist with carbon accounting reporting while receiving the appropriate training. Additionally, local women particularly have the most knowledge about local ecosystems. Without this knowledge, many attempts of

restoration by mining companies fail. Targeted integration of women would help both women and the environment, and ultimately the mining companies as well.

[Find out more »](#)



Extractives and Digitalization

Avoiding the “not in my backyard”-backlash by merging technology and sustainability drivers to benefit mining regions

The mining sector in the Andean region is experiencing a technological revolution which has been accelerated by the pandemic. The technological changes are here to stay and bring with it opportunities and challenges. On the one hand, new technologies have the potential to increase productivity and competitiveness, reduce the environmental footprint, and improve the monitoring / transparency of mining projects. On the other hand, some traditional jobs are at risk, as the sector requires people with different skills. MinSus, a German Cooperation Project that aims to promote responsible mining practices in the Andean countries, in collaboration with the Center for Copper and Mining Studies (CESCO), have brought together stakeholders working in the mining sector to assess the differentiated impacts that technological changes may have on rural mining regions, on mining cities, and on metropolitan cities. While rural mining regions may lose out due to new skill requirements and procurement needs, there are opportunities for new actors to enter the space in mining cities and metropolitan cities due to new technological demands. With close coordination between mining companies and the public sector, the transition for employees with traditional skills can be smoothed and the opportunities for technology-oriented start-ups promoted. The results of this research can be accessed [here](#). The research forms part of the global IGF assessment, which can be accessed [here](#). See the entire note and the intervention of the project leader Nicolas Maennling [here](#):

[Responsible raw materials »](#)



Just Transition

Enhancing Access to Information, Community Engagement, and Environmental and Social Performance in the Andean Region through the IRMA

As the international community increases action on climate to meet the targets of the Paris Agreement, there is focus on multiple levels to speed up the transition to low-carbon energy production. This transition is increasing pressure for industrial scale mining to produce materials used in batteries, wind turbines, solar panels, transportation, and other low-carbon energy technologies. Mining of these materials impacts communities, workers, and the environment on a vast scale that is felt across regions in the Andes. There is increasing recognition that the transition to a green economy must include addressing social, environmental, and governance impacts where raw materials are sourced. These can be enabled by timely public access to information about performance at the mine site level, made available in user-friendly formats. In 2020, the [Initiative for Responsible Mining Assurance](#) (IRMA) with the support of the MinSus project of the German

Development Cooperation and the advice of **CooperAcción** came together to: 1) review the level of access to information on environmental and social impacts on the mining sector in Peru, 2) collect information requests from communities impacted by mining in two mining regions of the country. In addition, IRMA and MinSus evaluated 3) how the IRMA voluntary sustainability standard could help fill identified gaps in access to information. Although this project has focused on a specific region of Peru, the results serve to further understand how the IRMA can better inform local stakeholders about the footprint of impacts of mining projects in their territories.

[See details and all the materials here »](#)



Upcoming Events

International Day of Women in Mining

15.06.2022, 3-5 pm CET, online

International Women in Mining Day, initiated by International Women in Mining (IWIM), will be celebrated with a two-hour event on June 15. On this day, IWIM will see, hear, and celebrate the perseverance, contributions, talent, and spirit of women in mining. It will highlight the progress made and opportunities available within the industry to continue becoming sustainable, diverse, and inclusive. All stakeholders involved in the industry are invited: from companies, academia, NGOs to governments and civil society organizations.

[To the registration »](#)

Gender Dimensions of Child Labour in the Mining Sector

16.06.2022, 2-4 pm CET, online

On June 16, **Women's Rights and Mining** (WRM) is hosting an online event about child labour in artisanal and small-scale mining (ASM). What's special: WRM and the international speakers are looking primarily at gender impacts and how to address child labour in mining through interventions that address gender. ASM can be up to three times more lucrative for women than field work, making an important contribution to family incomes. However, women or other marginalized groups are often left out of the debate to formalize ASM. The event, co-organized by X4D, seeks to answer the following questions:

- Why does the problem of child labour exist in the mining sector and what is its gendered character?
- What are the barriers and opportunities to address the problem?
- What is the evidence on effective, scalable, and sustainable gender-responsive interventions to address child labour in the mining sector?

[Register here for the event »](#)

Past Events

X4D at the 15th OECD Forum on Responsible Mineral Supply Chains Side Event on a Shared Vision on Responsible Mining

02.-06. May 2022, online

At the 15th OECD Forum on Responsible Mineral Supply Chains, the Sector Programme Extractives and Development organized the side event "Towards a shared vision on responsible mining: international perspectives on turning due diligence into positive change in the Andean Region". Within the last years, the number of due diligence frameworks has increased and so have the expectations concerning corporate action; however, in the mining sector, translating due diligence requirements and guiding principles into practical action and positive change continues to be challenging. Gathering

perspectives and inputs by different stakeholders from the Andean Region, China and Europe, the panel discussion focused on overcoming practical obstacles and identifying opportunities for cooperation towards a responsible mining sector. The event was moderated by Estelle Levin from Levin Sources. Dr. Sören Dengg from the Federal Ministry for Economic Cooperation and Development spoke welcoming words. The panellists discussing how to turn due diligence into positive change were (in alphabetical order) Stefan Crets from CSR Europe; Ana Carolina González Espinosa from the Natural Resource Governance Institute (NRGI), Franziska Killiches from the Volkswagen AG, Nicolas Maennling from GIZ, and Lihui Sun from the China Chamber of Commerce of Metals, Minerals & Chemicals Importers & Exporters (CCCMC).

Investing in African Mining Indaba 2022

09.-12. May 2022, Cape Town

With a focus on sustainability, this year's Mining Indaba sent a clear message that climate action is central to companies' ability to remain competitive. However, ensuring a Just Transition to climate-smart mining in Africa is beyond the capacities and resources of individual companies – as stated by many participants. Another topic was digital solutions in the mining sector. On a separate stage entitled "Mining 2050", presentations revolved around sustainable technologies, the use of Artificial Intelligence, and Internet of Things (IoT) in mines to new forms of work (Future of Work). The GIZ sector programme "Extractives and Development" organized a side event together with the Intergovernmental Forum on Mining, Minerals & Metals and Sustainable Development (IGF) entitled **"New Mining Technologies & the Future of Work"**. The aim of the event was to discuss the challenges and opportunities that different types of new technologies bring to the mining sector and its labour market.

[Read the article here »](#)

European Conference of the Responsible Business Alliance (RBA)

11. - 12.05.2022, Brussels

The RBA, together with the Responsible Minerals Initiative (RMI) and Responsible Labor Initiative (RLI), held its annual European conference on May 11 and 12, 2022. The conference brought together policy makers at EU and national level, industry representatives, scientists, international organizations, civil society organizations, and investors. The content of the conference was dedicated to the latest European trends and developments on the topics of design and implementation of binding corporate due diligence and the presentation of further efforts to establish due diligence along supply chains. Approaches to improve social and environmental impacts along global supply chains were presented and discussed at the conference. In this context, the GIZ project "Initiative Global Solidarity" (IGS) reported on its approach to improve working conditions along the entire supply chain in the electronics sector. Furthermore, developments and trends regarding environmental due diligence were discussed. One panel at the conference was dedicated to the specific challenges for responsible mineral supply chains. During this discussion, it was emphasized several times that due diligence in the upstream area would have to be given even more attention in the future.

EPRM Members Meeting

16. - 17. May 2022, Eindhoven

On May 16 and 17, 2022, the members of the [European Partnership for Responsible Minerals \(EPRM\)](#) gathered in Eindhoven for the first members meeting in presence since the beginning of the COVID pandemic. Representatives from BMZ, BGR and GIZ were among the participants. In addition to updates from the EPRM Secretariat and the four working groups, the focus was on the long-term strategic planning, which the EPRM is currently undergoing. In addition, several of the [EPRM-funded pilot projects](#) for responsible artisanal and small-scale mining (ASM) presented their work and progress. The EPRM was established in 2016 to accompany the [EU Regulation on Minerals from Conflict-Affected and High-Risk Areas](#) (CAHRAs). The Federal Ministry for Economic Cooperation and Development (BMZ) has been representing Germany as a member in the initiative since the beginning of 2020. For more information on the EPRM and its activities, please visit the [Website of the EPRM](#).

DMT Mining Forum 2022

19. - 20.05.2022, Berlin

The [DMT Mining Forum](#) takes place every two years in Berlin and is organized by DMT and TÜV Nord. The Mining Forum 2022 brought together experts and representatives of the mining industry for the 16th time. New this year was the more international orientation with country partnerships with the

Australian Chamber of Commerce and the Chilean Chamber of Commerce. In addition to numerous presentations focusing on the national and international commodity market, mainly German companies and institutions exhibited their products and services. The forum attracts around 400 participants each year. This year's motto was "For a sustainable future" and thus focused on sustainable development in the mining sector and on raw materials needed for the energy and mobility transition.



Did you know...?

...that June 15 is International Day of Women in Mining? The day, which was initiated by International Women in Mining (IWIM), celebrates the achievements and talent of women and advocates for greater integrity in the mining sector.

[International Day of Women in Mining»](#)



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