



Chairman – Lester Hicks
Secretary – Chris Waite

**Minutes of 25th Meeting of the UK Minerals Forum,
held at The IoMMM HQ, 1 Carlton House Terrace, London SW1Y 5DB
on Thursday 20 November 2014 at 11 00am.**

Present: -

Lester Hicks - Chairman

Ruth Bradshaw – CNP
Bob Brown – CPRE
Lauren Darby – British Ceramic Federation
Jim Davies – EA
Peter Day – POS/LGA
David Highley – Independent
Nick Horsley - Sibelco
Jon Humble – EH
Peter Huxtable – CBIMG/BAA/IoMMM
Nigel Jackson – CBIMG/MPA

Bob LeClerc – CBIMG
Hugh Lucas – CBIMG
Jo Mankelow – BGS
Brian Marker - Independent
Eamon Mythen - DCLG
Mark North - Kier Minerals Ltd
Barney Pilgrim – HJ Banks
Ian Selby – The Crown Estate

Chris Waite – Secretary

1 Welcome and Introductions

1.1 The Chairman welcomed Lauren Darby returning from maternity leave.

2 Apologies for absence

Apologies were received from:

Simon van der Byl – CBIMG/MPA
Ruth Chambers – Independent
Mick Daynes - Hanson
Alan Everard – Lafarge Tarmac
Bob Fenton – CBIMG/MAUK
Philip Garner - Coalpro
Ken Hobden - MPA

Simon Kirk – DOE NI
Darren Moorcraft - RSPB
Nigel Symes - RSPB
Nick Tennant - DCLG
Andrew Tyler – OMYA UK Ltd
Paul Wilkinson – The Wildlife Trusts
Lonek Wojtulewicz POS/LGA

3 Minutes of the Last Meeting, 26 June 2014

3. 1 The minutes were agreed and there were no matters arising other than on the agenda.

4 Action Points from the last meeting not dealt with elsewhere

4.1 Mineral planner training (from the 2010-2011 Working Groups): The Chairman said that the IoQ distance learning package needed testing with serving planning officers to see if it was suitable for planning officer training. Lonek Wojtulewicz had been asked to assess it and respond to IoQ by mid December. **Action: LW**

4.2 Minerals awareness in revised school curricula (from the 2010-2011 Working Groups): BM said that ESTA had experience of the many hours of work involved in identifying existing resources and indexing them, but felt it could not give priority to this now. The publication of Key Stage 4 of the National Curriculum was awaited, and a new A level syllabus in 2017. ESTA considered that there would not be time in the syllabus to accommodate talks from quarry operators, except as part of careers advice. However, it would be helpful if the Forum could compile a list of its members or parent organisations willing to give opportunities for site visits. ESTA would provide advice on the types of visits that would be most needed and welcomed. BM suggested that in view of this response, the Forum should focus on preparing a list of site visiting opportunities, placing the list on appropriate websites and advertising the facility in suitable publications for teachers.

The Forum was disappointed at the response of ESTA. NJ pointed out that access to quarries was already encouraged through local liaison groups and schools, and there were sections of the MPA website aimed at such visits. Others commented that the take up of opportunities depended on teachers, proximity to a suitable quarry, and health and safety aspects. It was felt that IoQ and IoMMM could do more in association with academia. The Chairman and NJ would discuss with BM whether a further approach should be made regarding the syllabus.

Action: Chairman, NJ & BM

5.7, 5.8 Future Scenarios Working Group – to be dealt with under item 5 below.

6.2 LWM5 to be dealt with under items 6 & 7 below

9.1 Seminar on National Parks to be dealt with under item 9 below.

5 Future Minerals Scenarios Working Group

5.1 JM had submitted a paper UKMF 25/02 noting that the final report of the Working Group (WG) had been signed off in June and placed on UKMF website in October. With the aid of Barrie Hedges, through the support of MPA, a concise illustrated summary report 'The Future of our Minerals' had been printed and made available at LWM5.

2. In retrospect it had been difficult to combine the two separate proposals for work on future resource security/security of supply issues – one on a future scenarios approach, the other on a mineral by mineral basis. What was attempted was probably overambitious and took much more time than anticipated – greatly assisted by the WG Chairman and Secretary being able to meet fortnightly. The WG hoped that the two reports would prove valuable briefing for a wide audience and assist in the formulation of a minerals strategy for the UK. Some 250 hits had been made on the website so far, and LWM5 should stimulate more interest.

*(the LWM5 summary report *The Future of our Minerals* is now available to download from the Forum's website at*

http://www.bgs.ac.uk/ukmf/downloads/UK_MineralsForumFINAL07112014.pdf

or is listed with all other reports from the WG at <http://www.bgs.ac.uk/ukmf/groups.html>)

3. After a short discussion it was agreed that the Chairman should send copies of the Summary Report to the relevant ministers in the UK's territorial administrations, the Chairman of the BIS Select Committee and the Co-Chair Convener of the Associate Parliamentary Minerals Group (Roger Williams MP). He would point to the conclusion that there was a need for a coherent UK strategy for its land-won minerals, but would not discuss its possible detailed scope and content. The Chairman would liaise with NJ on content and timing.

Action: Chairman, NJ

4. The Chairman thanked the WG and particularly the Chairman and Secretary for the work they had put in to produce the data and then the documents. Those present warmly endorsed that.

6 Living With Minerals 5

1. NJ said that the theme of the Conference, the need for a Minerals Strategy, was well supported with an 80/20 voting split in support of the core issues, compared to a 50/50 split of industry/others attending. UKMF members agreed the Conference had been well run with an impressive array of speakers, but the senior government contributors were generally disappointing. They had not been well briefed, perhaps reflecting the reduced level of staff support in government, and lacking time and expertise to understand the sector and minerals supply issues. NH said that he regretted that the morning speakers were not formed into a panel just before lunch, as they then avoided questions on controversial elements of their presentations. He understood this was the decision of the presenter as the session was going over time. RB said there was reference to carbon and energy, but little coverage of environmental issues such as landscape protection or biodiversity. HL said that was due to the focus on getting the economic case across. LH added that in his brief presentation of the UKMF Future Scenarios summary he had pointed to the Working Group conclusion that access to minerals had been successfully balanced against environmental impacts by highly protective legislation, and that this must be maintained. In the final QA session he had said that UK was still a place where minerals operators could operate successfully producing essential materials, but they could not expect the super-normal returns possible in parts of the world with little or no regulation.

6.2 The Forum congratulated NJ and CBI Minerals Group for the organization of LWM5, and taking on the preparation and printing of the Summary of the Future Scenarios report. This created a welcome opportunity to air a range of important issues for the UK.

7 UK Minerals Strategy

7.1 Introducing his work on CBI Minerals Group's Strategy, HL thought the UKMF WG's report on Future Scenarios for Minerals was one of the most significant since the Verney and Stevens Reports in the 1970s. Those responded to a looming crisis of a shortage of sand and gravel supply to London & the SE. Since the time of Verney and Stevens, the tonnage of aggregates extracted had declined, but **the need** for an adequate aggregate supply remained just as strong. Government had no minerals strategy, only responding to crises as they arose (such as currently on energy with its support for on shore oil & gas from shale). In all the government documents that he had looked at in preparing the Strategy, he could find only one sentence in a DEFRA circular which referred to using UK mineral sources rather than having to look to alternatives. The strength of the WG report was that it was supported by the wide-ranging UKMF membership.

7.2 **The economic case** for the Strategy was illustrated in the semi circular diagram handed out at LWM5 and emailed to the Forum. The 'core' of minerals in the diagram was small, but the reach in Gross Value Added terms expanded as minerals were used downstream, showing how they permeate all aspects of the economy and society. The final GVA figures were huge, emphasising the central importance of minerals to the UK.

7.3 It was better for our economy to use our own resources, but where UK did not possess such resources, **we need to import**. The EU was taking steps to achieve EU security of supply. Was our Government fully engaged with countries that possess minerals that we would need to import, some holding near monopoly control?

7.4 The Government needed to recognise that mineral extraction in the UK was in the national interest and **the debate should be** moved on from whether minerals needed to be extracted, to **how minerals are to be extracted**. UKMF might develop criteria on how extraction could take place to the benefit of the economy without blighting the environment, and seek consensus through constructive rather than adversarial debate.

7.5 Concluding, HL said that CBIMG intended to consult on the Strategy. This could be both through UKMF to its constituent bodies, but also go wider eg directly to planning officers, vNGOs and other parts of the economy. The objective was to gain broad acceptability and credibility. However, internal consultation within CBI would take place first, to gain solid industry support. He anticipated that the final document would be no larger than the summary of the Scenarios WG though it would need to refer to background and source material. The Chairman suggested that as UKMF meetings were months apart it might be necessary for the consultation to carry on between meetings in packages as the draft strategy progressed. UKMF could handle this by email or at a scheduled meeting depending upon the timing. It

also needed to be clear about UKMF's role, with members such as CPRE, RSPB and POS needing to consult internally. NJ felt that UKMF was probably the best vehicle through which to channel consultation. The Chairman noted that it would not be practicable to condense the potential range of views into a consensus; it was better to send on the parties' views and leave CBIMG to consider them direct. The Chairman would discuss mechanics further with HL & NJ.

Action: HL, NJ & Chairman

7.6 Three particular issues were raised in the following discussion which the Strategy would need to take account:

- The statutory 2042 permission end-date, which could result in the loss of all aggregate production from National Parks; 25% of UK supply.
- It could not be assumed that UK had the capacity to import sufficient minerals if there was no strategy for continuing to use UK resources first
- the uncertain political climate with a general election in 2015, a possible referendum on EU membership in 2017, and reverberations from the Scottish Referendum vote.

Action: HL

8 Can the Train Take the Strain?

1. RB said that having read the report in the latest MPA Mineral Products today magazine, she raised this as a potential topic for UKMF future attention. The Chairman said that sufficient rail paths for aggregates remained a problem, and it was critical that rail capacity for freight was not lost, such as train paths no longer used for coal movements. Moreover, if the major rail linked rock quarries that currently served London & the South East were almost all closed by 2042, it was very difficult to see where alternative quarries for strategic supply might be sited. Construction of any lengthy new quarry access lines would be prohibitively costly. But without rail access new large quarries for strategic supply of high quality hard rock would result in long distance road haulage with unwanted environmental consequences.

8.2 MN said that his company frequently had booked rail paths cancelled, perhaps five or six out of fourteen to sixteen paths. There was a chronic shortage of drivers, and the problem lay not just with Network Rail, but with the privately owned rail freight companies. Long haulage of aggregates was less financially rewarding to them than short haulage. UKMF agreed that this was a serious supply chain issue.

3. The Chairman said that long distance minerals hauled by rail had been the subject of an earlier UKMF Working Group which reported in 2011. Research of aggregates haulage by rail had been funded by the Aggregates Levy Sustainability Fund and reported by MIRO in 2011, which he had summarized in 2012. He would provide the links to RB.

Action: Chairman

9 Environmental Update

9.1 RB said that the seminar on National Parks had been attended by over 30 people. It followed the CNP launch of its 'National Parks in the 21st Century: a manifesto for the next Westminster Government'. CNP was looking not only for increased protection in designated parks, but was also seeking new National Parks.

2. In response to HL, RB confirmed that CNP maintained its objection to a new potash mine in the North York Moors National Park. Although it was recognised that the mine was important internationally, and would provide significant financial returns to UK, the objection was being maintained as the production was for export rather than a national need.

10 UKMF Future Focus

1. The only proposals put forward before the meeting for possible future attention were **An examination of the merits of restoration guarantee funds** by Graham Marchbank, and concern about **rail paths for aggregates** by Ruth Bradshaw. Neither of these received support, in the former case because MN and BP said talks were already in progress between the coal industry and the Scottish Government, and in the latter case because of the fairly recent Working Group and MIRO reports (see minute 8 above). At the meeting IS proposed **development of a mineral resources statement for the UK**. This could collate existing data

such as in BGS reports and support the CBI Minerals Strategy, but have the merits of being a UKMF document independent of the Strategy. The Chairman pointed out that to fulfill this function it would have to be prepared within a few months to precede the CBI Strategy which presumably would itself need to be completed no later than Summer 2015. BGS would have to be the main data source as UKMF did not have its own analytical capability, and there were no alternative data sources. JM confirmed that BGS did not have the resources to prepare such a report.

2. Summarising the discussion, the Chairman said he was not surprised that future work streams had not been agreed at this meeting so soon after LWM5. UKMF would be consulted on the emerging CBI Minerals Strategy, but also needed to decide on its own forward work programme at the next meeting in March. UKMF members were asked to bring forward ideas. In view of the previous focus of WGs, it might be useful if the future programme focused on environmental issues.

Action UKMF members

11 DCLG Verbal Report

11.1 Eamon Mythen reported that DCLG minerals and waste team had completed its move to the Fry building on the Home Office estate at Marsham St. It now had a full staff complement of five with Nick Tennant as team leader. Brandon Lewis had replaced Nick Boles as Minister. He wanted to bed in the recent changes to planning rather than create any new changes before the election in 2015. The next National Aggregates Minerals Survey contract would be awarded to BGS after a further conversation, and he hoped that it would start in January 2015. DCLG's website had been updated to include all AWP Secretary contacts and 2012 monitoring reports (except for the West Midlands which was producing the 2011 & 2012 reports together), and will include 2013 reports when they are all available. AWP Secretaries: A meeting was held in October at which progress on LAAs and Annual reports was discussed. EM consulted the AWP Secretaries on a report he was drafting for NCG. A number of 2013 Annual reports had been received by DCLG but could not be placed on the web site until they were all available. DCLG was taking steps for new contracts for AWP secretaries to run from April 2015. An NCG meeting was proposed in January/February 2015. Joint Minerals Information Programme: DCLG was also taking steps to renew this framework contract with BGS within which ad hoc work relevant to minerals planning could be commissioned. AMRI: the survey for 2013 had been published. An extension for ONS to cover year 2014 had been completed. Planning Guidance (NPPG) the web based guidance has had a number of additions relevant to minerals planning - on peat, underground coal gasification and underground storage of natural gas. A new planning policy on waste management had also been published, replacing PPS10. On Shore Oil & Gas: the two applications for exploration sites and monitoring stations by Cuadrilla were due to be determined in January and February. DECC had published on its web a descriptive note on the operations for oil & gas exploration and extraction aimed at raising public understanding.

12 UK Territorial Administrations

12.1 Scotland: a note by Graham Marchbank had been received; the Secretary would circulate it with the minutes.

12.2 Wales & Northern Ireland: no reports had been received.

13 Any Other Business

1. The Chairman said that he had received a request from BIS via the CBI Minerals

Group regarding the Extractive Industries Transparency Initiative (EITI). There were a range of voluntary civil society groups involved in the EITI process through a Multi Stakeholder Group (MSG). BIS /MSG asked whether the voluntary sector side of UKMF would like to join the process of developing an EITI for the UK. The Chairman said he would write to the vNGOs on UKMF with the background material, and asking if they wished to consider becoming involved. There would be no need for early decisions; a speaker from BIS would explain EITI further at our next meeting in March 2015.

Action: Chairman

13.2 It had been suggested to the Chairman that the National Trust should be invited to join UKMF. The meeting agreed that an invitation should be sent.

Action: Chairman

3. NH said he had a discussion with Iain Stewart at LWM5 over the potential for a new Minerals Planning Course. He would discuss with the Chairman post the meeting.

Action NH & Chairman

4. NH said that the EU Ad Hoc Working Group Report on the Framework Conditions for the Extraction of Non Energy Raw Materials had been adopted by EU. A web link would be sent to the Secretary to include with the minutes.

(JM has subsequently sent a copy of the report which will be issued with the minutes)

Action: Secretary

14 Date of Next Meeting

1. The date of the **next meeting will not be 18 March**. An alternative is being sought and you will be advised in due course.

The following meetings in 2015 are confirmed as starting at 11am at the IoMMM, 1 Carlton House Terrace on Thursday 25 June and Thursday 19 November. Coffee will be served from 10 30am and a buffet lunch at 1 30pm. To avoid over catering, members are asked to indicate 7 days in advance of the meeting if they could not attend or would not be staying for lunch.