The minerals sector perspective in education & training

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The future of education and skills in the raw materials sector

26th April 2021
Webinar
1. IMA in a nutshell
2. Minerals: Enablers of multiple value chains
3. EU: Skills agenda
4. Job-profile changes in the minerals sector
5. Take away messages
1. In a Nutshell: Industrial Minerals Association

IMA represents an Umbrella of 10 associations:

<table>
<thead>
<tr>
<th>Association</th>
<th>Category</th>
<th>Statistics</th>
</tr>
</thead>
<tbody>
<tr>
<td>KPC</td>
<td>Clays and Kaolin</td>
<td>250 member companies</td>
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<tr>
<td>EUROTALC</td>
<td>Talc</td>
<td>685 mines and quarries</td>
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<tr>
<td>EUBA</td>
<td>Bentonite</td>
<td>750 processing plants</td>
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<td>EUROSIL</td>
<td>Crystalline silica</td>
<td>180 million tons of minerals produced per year</td>
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<td>IDPA</td>
<td>Diatomite</td>
<td></td>
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<tr>
<td>EUROFEL</td>
<td>Feldspar</td>
<td></td>
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<tr>
<td>EBA</td>
<td>Borates</td>
<td></td>
</tr>
<tr>
<td>CCA</td>
<td>Calcium carbonate and Dolomite</td>
<td></td>
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<tr>
<td>EULA</td>
<td>Lime</td>
<td></td>
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<td>ESMA</td>
<td>Magnesite, Sepiolite, Mica</td>
<td>42,500 people employed in 28 European countries</td>
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<td>(30 million jobs in downstream industries)</td>
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<td>€14 billion annual contribution to Europe's GDP</td>
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2. Minerals: Enablers of multiple value chains

**GLASS**
100% minerals
Silica sand, Dolomite, Calcium carbonate, Lime, Feldspar, Borate

**CERAMICS**
100% minerals
Feldspar, Clay & Kaolin, Lime, Talc, Silica

**PAPER**
up to 50% minerals
Calcium Carbonate; Talc, Kaolin, Bentonite

**Smartphone**
up to 60% minerals

- **Cover** - resistant, lightweight, fire-proofed and recyclable Carbonates, Mica, Talc
- **Battery** - Calcium carbonate, Silica sand, Clays
- **Reinforced Steel** - Silica sand, Andalusite, Lime
- **Glass** - 47 g Silica sand
2. Minerals: Enablers of multiple value chains

HOUSE
up to 150 t of minerals

- Cement (Clay, Lime, Silica sand), Plaster & Plasterboard (Gypsum, Hydrated lime, Calcium carbonate), Insulation (Perlite), Ceramics, Bricks & Tiles, Glass, Paint etc.

CAR
up to 150 kg of minerals

- Rubber (Talc, Calcium carbonate), Plastics (Talc, Calcium carbonate, Kaolin, Silica sand), Glass (Silica sand, Dolomite, Calcium carbonate, Lime, Feldspar, Borate), Casting (Bentonite, Silica sand), Foundry (Silica sand)
2. Minerals: Enablers of infrastructure

Expansion & Maintenance

1 km **Highway** = c. 216,000 t of minerals*

1 km **National** = c. 87,000 t of minerals*

1 km **Railway track** = c. 35,000 t of minerals**

**For Steel:** Lime, Silica sand, Bentonite

1 km **Cycle track route** = c. 11,000 t of minerals*

*: aggregate, lime, calcium carbonate   ** aggregate
2. Minerals: Enablers of Decarbonisation

Infrastructure & Energy generation

Wind Power

**Turbine blades**
Advanced plastic & Fiberglass, Silica sand, Limestone, Borax, Feldspar, Nepheline Syenite, Magnesite, Kaolin and Clay

**Turbine high tower (140m)**
c.120t of steel → **minerals**: Limestone, Bentonite and Silica sand

**Turbine tower foundation**
c.600 m³ of concrete + c.70 tons of reinforced steel → **minerals**: Lime and limestone, Aggregates and Bentonite
3. EU Skills agenda

The new European Skills Agenda builds upon the ten actions of the Commission’s 2016 Skills Agenda. It also links to the

- European Digital Strategy
- Industrial and Small and Medium Enterprise Strategy
- Recovery Plan for Europe
- Increased support for youth employment

Five building blocks:

1. Calls for collective action, mobilising business, social partners and stakeholders, to commit to working together, in particular within the EU’s industrial eco-systems

2. Defines a clear strategy to ensure that skills lead to jobs

3. Helps people build their skills throughout life in an environment where lifelong learning is the norm

4. Set ambitious objectives for up- and reskilling to be achieved within the next 5 years

5. Identifies the financial means to foster investment in skills
4. Societal changes vs labour adaptations

**Baby Boomers**
- 1946 - 1964

- Work ethic (17%)
- Respectful (14%)
- Values/Morals (8%)
- "Baby Boomers" (6%)
- Smarter (5%)

**Gen X**
- 1965 - 1980

- Technology use (12%)
- Work ethic (11%)
- Conservative/Traditional (7%)
- Smarter (6%)
- Respectful (5%)

**Millenials**
- 1981 - 1995

- Technology use (24%)
- Music/Pop culture (11%)
- Liberal/Tolerant (7%)
- Smarter (6%)

**Gen Z**
- 1996 - 2010
4. The labour market changes in time

Post 2nd world war (1945+):

• Education **nearby** home

• **Steady** job environment/conditions

• You **learn** at the job-site

• The beginning of **automation** in industry

• Most employees **one employer** in a lifetime

Some of the causes of change:

• European Union

• **ERASMUS**

• **Mobility**

• **Connectivity**
  • **More possibilities**
  • **Job profile description more complex**

Millennials (1981-1996):

• **Longer** education nearby home **combined with abroad studies**

• **Dynamic** job environment/conditions

• You are **trained** at the job-site

• The beginning of **digitalization** in industry

• Most employees **change multiple jobs/sectors** often
4. Mineral sector: Why people join/stay?

- The family connection (from Mother/Father to Son/Daughter);
- The minerals sector companies known during studies;
- Dynamic sector where one mineral enables multiple applications;
- Moving to another application, gives the perspective on another sector;
- Continuous training to boost retention and possibility to grow professionally;
- Sometime people leave and they come back;
- ...
4. Talent Development & Retention  (1/2)

1. Education:
   - Companies build curricula’s with Schools/Universities
   - Identify and motivate talent development
   - Create network for future employment opportunities
   - Examples: Belgium, France, Rumania, Scandinavia ...

2. Training on the job site:
   - Coaching
   - Continuous training
   - Professional development
   - Multiple trainings per year in each company
3. Anticipate upcoming profile needs:

1. At company level
2. Multiple sector challenges
3. Participation in multiple EU projects addressing vocal educational training (VET)
   - Skills Alliance for Industrial Symbiosis (SAIS)

Scope: Enable and accelerate uptake of Industrial Symbiosis and energy efficiency by developing a comprehensive cross-sectorial* blueprint for skills.

SPIRE-SAIS project aims to develop:

- Develop an *industry-driven and proactive skills strategy* that will assist the wider implementation and exploitation of industrial symbiosis and energy efficiency principles for eight SPIRE sectors*;

- **Address possible skills shortages in the eight industries** while providing EU citizens with the necessary skill sets for future job profiles.

- The project will **address updating of the curricula, qualifications, knowledge and skills** that are required to support essential cross-sectoral collaboration in Industrial Symbiosis and Energy Efficiency.

* 8 sectors: chemicals, steel, engineering, non-ferrous metals, minerals, water, cement, and ceramics
5. Take away messages

1) Education is the first step to a job profile & position
   Education supported by on-site learning and continuous training are success factors for long retention of employees

2) Minerals sector transition needs new skills
   Dynamics of job profiles and matching of Industrial sector needs

3) Company action to innovate and motivate employees
   Long life learning is an opportunity to evolve in the job position

4) A sector does not act alone in job profile evolution, but value chain action is necessary to create cross value chain opportunities
   Cross sectoral action is needed to implement successfully the EU pact for skills and respond to upcoming policy challenges
Imagine the Future with Industrial Minerals

2050 Roadmap

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For further information...