

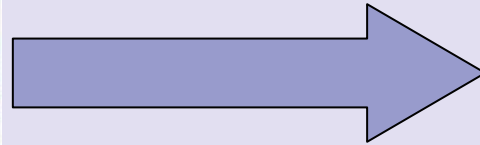


CHAIRMAN'S INTRODUCTION

history, program,
envisaged outcomes

Trigger (2002-2003)

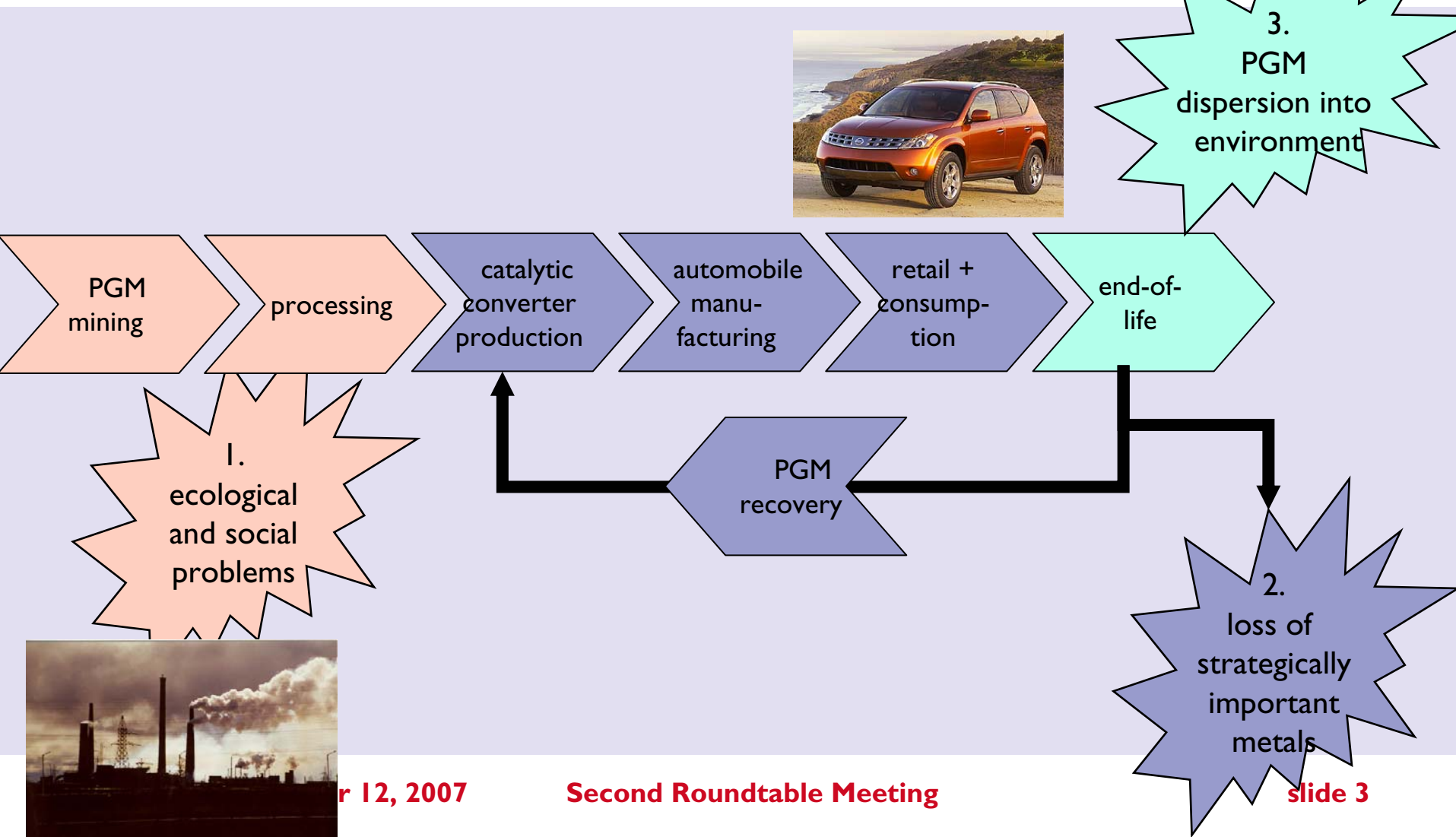
ROUNDTABLE ON
SUSTAINABLE
PLATINUM GROUP
METALS



- Studies by German Oeko-Institute:
 - gigantic pollution by Russian PGM mining
 - contradiction: clean car \leftrightarrow dirty metals
- Hypothesis
 - possibility of a profitable partnership between mining industry, automobile industry & others
 - beneficial to the environment and to business interests

The Issues

ROUNDTABLE ON
SUSTAINABLE
PLATINUM GROUP
METALS



The First Roundtable (2005)

ROUNDTABLE ON
SUSTAINABLE
PLATINUM GROUP
METALS

■ Discussion issues

- Sustainability of PGM
 - Production (Russia): improvement recognised
- Demand and Supply tensions
 - no immediate scarcity
 - future tensions likely
- End of Use / Recycling
 - problems recognised
 - no agreement on solutions
- Dispersion during Use
 - acute risks not clear
 - guidance by precautionary principle



- ## ■ Objectives after 2005 Roundtable
- production: include South Africa and North America
 - more high level support from mining/processing companies, automobile industry and government (national, EU)

The International Committee

ROUNDTABLE ON
SUSTAINABLE
PLATINUM GROUP
METALS



Dr Michael Angrick	Umweltbundesamt Dessau
Dirk Bosteels	AECC
Dr. Matthias Buchert	Öko-Institute
Dr. Christian Hagelüken	Umicore
Jean Philippe Hermine	Renault
Alexey Kiselev	GP Russia
Gabrielle Randlshofer	International Platinum Association
Prof Dr Armin Reller	University Augsburg
Arne Richters	Toyota
Michael Steel	consultant to Johnson Matthey

Roundtable Participants

ROUNDTABLE ON
SUSTAINABLE
PLATINUM GROUP
METALS

	2005	2007
	19	37
Mining / processing	6	5
Automobile industry	3	8
Government	1	6
NGOs	5	11
Research / Consultants	4	7

Today's Program

ROUNDTABLE ON
SUSTAINABLE
PLATINUM GROUP
METALS

10:00	Welcome & Introduction	12:45	Lunch
MORNING SESSION MINING AND PROCESSING		AFTERNOON SESSION CLOSING THE PGM LOOP	
10:15	South Africa Francis Petersen, Anglo Platinum John Capel, Benchmarks F.	13:45 14:05	Christian Hagelüken, Material Flows Matthias Buchert, Hamburg Port case study, discussion
11:00	Russia Mike Steel (Johnson M.) Alexey Grigoriev (SEU)	14:30	Armin Reller: the car industry's interests and responsibilities discussion
11:45	Gabriele Randlshofer (IPA) Stu Levit (Earthworks)	14:50	The positions of governments and NGOs - NN: EU policy on ELV - Doreen Fedrigo, EEB - Dr Wendenburg, BMU Berlin - and others
		16:00	Discussion: Ideas for action Chairman's summary drinks

Rules of the Game

- This meeting's character
 - open exchange of ideas, facts, visions, ...
 - it is not about: defending positions, negotiating political support, etc.



- Chatham House Rule
 - “When a meeting, or part thereof, is held under the Chatham House Rule, participants are free to use the information received, but neither the identity nor the affiliation of the speaker(s), nor that of any other participant, may be revealed”