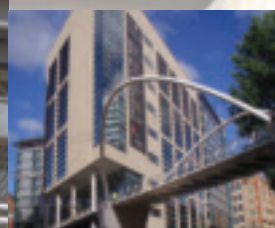


UK Minerals Forum
Working groups findings
2009-2011



A summary report



Background

The UK Minerals Forum (UKMF) aims to draw together key stakeholders to debate and inform government and the public on the prudent use, sustainable management and supply of UK minerals.

The forum has a broad membership drawn from industry, regulators, green groups and government. It holds regular meetings and convenes working groups to research and report on critical issues. The UKMF is a key contributor to the CBI Minerals Group's Living with Minerals conference series.



Introduction

After preliminary consideration at UKMF's 9th meeting in June 2009, three working groups were established at the 10th meeting in November that year to report findings and make recommendations to the 4th Living with Minerals Conference (LWM4) in November 2011 on the following topics:

WG1: the distribution of bulk minerals to future markets with particular reference to aggregates and coal;

WG2: addressing the perceived shortage of mineral planning skills in local government;

WG3: developing the minerals industries' engagement and communications with communities.



WORKING GROUP 1:

distributing minerals to future markets

WG1 looked at two nationally important minerals, – hard rock aggregates and coal – to see how their effective distribution to future markets in the UK might be maintained over the period to 2042. It therefore covered the majority of mineral movement by tonnage, and an even greater proportion of minerals hauled by rail. The work was informed by a parallel ASRP-funded report, “Distributing bulk aggregates to future markets” produced by a consortium led by Colin Buchanan and Partners for MIRO. That included a detailed territorial analysis of existing and future resources, identifying the constraints and opportunities for the future rail haulage of bulk aggregates from all areas of England. Safeguarding existing rail-served depots in major urban areas was also important to maintain the present level of rail use.

The present infrastructure for transporting UK-mined and imported coal appears broadly sufficient to meet foreseeable future needs, based on the present pattern of supply. However, any possible return to substantial domestic coal production from major new deep mines would need suitable rail access. The costs, which the

Buchanan study found could be considerable, would need to be absorbed into mine development costs.

The prospects for maintaining, let alone increasing, the proportions of aggregates hauled by rail are less encouraging. While there may be some scope to increase the volume moved from present rail-linked quarries, spare capacity on the network is becoming limited and pressure from increasing passenger volumes and higher value freight would make a step change up from the pre-recession level of about 10 per cent very difficult to achieve.

WG1 was also concerned that new hard rock quarries, developed to replace production lost as existing ones are exhausted or closed under the 2042 rule, should be connected to the rail network. But the Buchanan report confirms that to do so at economic cost would need a much less onerous technical approval process and the reinstatement of the Government rail facilities grants ended in 2011.

Even if the capital costs of connecting a new site in the range £1m-£25m could be made commercially acceptable



to mineral operators, the engineering and land acquisition obstacles in constructing or reinstating any other than a very short rail connection were such that Buchanan instead recommended increasing production at existing rail-served quarries or boosting bulk imports by sea.

Without extended permissions, the former is not a long-term solution. Nor is the imports option without major challenges. Suitable sources would have to be located at an economic distance. And, as was found necessary to facilitate coal imports over the past 15 years or so, rising steeply from 23.5 million tonnes in 2000 to a peak of almost 50 million tonnes in 2006, the latter would require access to sufficient deep-water berths and stockyards.

Just to replace the present production of the high volume rail-served hard rock quarries would require either the diversion of port capacity or the construction of new facilities. In justifying either course, aggregates would have to compete against higher value bulk cargoes offering better returns. Even if this could be achieved, some increase in price is, therefore, inevitable.

WG1 therefore recommended that the minerals and associated industries engage on these issues with central and local government, the on-departmental public bodies and voluntary non-governmental organisations, picking up on responses on them in the consultation of the draft National Planning Policy Framework. However, accepting

that road haulage will, even if the present proportion moved by rail is maintained, remain by far the dominant transport mode for minerals, the industries should also make a determined effort to promote more efficient transport so as to reduce its carbon footprint and other adverse impacts.

Voting at LWM4 strongly favoured increased use of rail for aggregates transport (69 per cent), though this looks highly optimistic in the light of the Buchanan findings and the fact that all but one of the large rail-served quarries in Somerset and Leicestershire are due to close by 2032 unless extensions are granted.

Fifty per cent of those voting supported rail links for new sources of coal supply. That is probably more realistic given the geography of coal and the much higher value of coal as an energy mineral in a capital-intensive sector. Almost 56 per cent saw increased rail use as helping to improve the climate impacts of minerals transport.

Finally, 70 per cent supported longer-term transport planning to meet expected future requirements for mineral distribution. In this respect, LWM4 endorses the thrust of WG1's core recommendation – for both economic and environmental reasons there is a pressing need for co-ordinated government-led action to plan for and secure sufficient suitable capacity for future bulk minerals transport.



WORKING GROUP 2:

planning skills

WG2's work responded to concern that a shortage of suitably skilled and experienced mineral planners, particularly in local government, was a significant factor in delaying the production of up-to-date minerals plans and processing applications for development, adding to costs for minerals operators and to restrictions on future supply. WG2 therefore assessed the degree of skills shortages, mainly but not only in mineral planning authorities, reviewed existing formal training provision, and proposed solutions to the problems it identified.

The group found there were probably 150-200 full-time equivalent staff working to some extent on mineral planning in local authorities across the UK. The numbers were declining, with a net movement from the public to the private sector of about 3:1. The reduction in planning posts and the retirement or redundancy of senior, experienced mineral planners under the present public expenditure constraints meant the position could only get worse.

There was empirical evidence that significant delays in preparing mineral plans and dealing with applications were at least partly due to staff shortages. Even where

planners were becoming available through restructuring, there was no money to redeploy them onto minerals work. There was also a lack of specialist minerals skills and knowledge within the profession, and the work was not attractive for new-entrants from the planning schools. There was too much reliance on casual learning on the job. Only two specialist short in-career introductory courses were available for existing planners moving into minerals work.

WG2 concluded that solving the problem would require a range of approaches. But the key to success would be developing a targeted short course aimed at early to mid-career planners. At a minimum of five days, this would go beyond what is currently available. Complementary action might include encouragement of new entrant planners into minerals work through industry-government road shows as used successfully in Scotland, better-structured on-the-job training including mentoring by more experienced officers, and staff exchanges with industry. The recent government-encouraged initiative to share services and staff between neighbouring authorities should be applied to mineral planning.



At LWM4, 64 per cent agreed there was a problem now, and a further 22 per cent foresaw potential future difficulties. However, only 16 per cent saw staff shortages as the main problem for the industry. Some 27 per cent blamed the complexity of local government and almost 30 per cent problems with statutory consultees, with 19 per cent blaming other, unspecified factors. Despite this, only 8 per cent were clearly opposed to promoting mid-career training; 46 per cent offered unqualified support, 23 per cent would have been in favour but for present financial circumstances and another 23 per cent offered support in principle, but subject to modifications.

When it came to who should fund the development of an in-career course, only 16 per cent felt this should fall on the industry. Far fewer still felt the universities or the national skills bodies should take the lead, but over 64 per cent felt this was something for all three to work through together.

In further discussion after the voting, it was suggested that the industry's existing collective training arrangements run under the auspices of the Mineral Products Qualifications Council (MPQC) could be the best way forward. It was not appropriate to go direct to mineral operators for funding work that was really the responsibility of mineral planning authorities as their statutory regulator.

WG2 had always recognised that finance would be crucial in delivering its analysis and recommendations. The development of a short course would certainly require funding, and perhaps also its initial operation. Together with the delivery of other initiatives, the programme of action would need a significant time input. Following the voting and discussion at LWM4, and subsequent soundings in the industry, the possibility of funding through MPQC and delivery through the Institute of Quarrying (IoQ) as its agent is to be discussed with IoQ in summer 2012.

WORKING GROUP 3: communities and communication

Mineral working is one of the least popular forms of development with the public. Minerals policies in development plans and applications for new or extended extraction are often strongly contested. This is felt in part to reflect a lack of understanding. WG3 was, therefore, convened to review existing materials used in communication with the general public, government and regulators, to prepare and disseminate new material and advice on methods of communication, and to identify any need for, and if necessary to specify, further work. In the light of its review it prepared:

- ✱ (through the British Geological Survey) a trial educational pack and tested it with teachers;
- ✱ an adaptable set of materials in a range of media to explain what is involved in minerals operations in the UK and their planning and other regulatory controls;
- ✱ (through the Mineral Products Association) a summary of methods and techniques for communicating with target audiences.

Replies to questions put to LWM4 showed an overall voting majority of 56 per cent that favoured seeking to stimulate interest amongst 10-18 year olds through a

combination of site visits, role playing and direct lessons, with a further 31 per cent favouring

site visits as the best option. Views were split on what the public most needs to know; 36 per cent felt this was information on what minerals are used for, 20 per cent favoured guidance on how the public can engage with the industry and its regulators, and 11 per cent thought it was information on what can be done to improve and restore sites – implicitly reducing environmental and amenity impacts. But 26 per cent of the votes favoured conveying other, unspecified, information.

The subsequent debate revealed some uncertainty. How can the public be sensibly approached without knowing what they want to know? Was there any point in doing so where no particular proposals were affecting an area, and was it wise to cut across statutory consultation through the planning process?

As for the media best suited to create better understanding of minerals issues amongst the public, 52 per cent favoured television and 26 per cent "other



techniques". It is hard to get behind the latter category, but in part it seems to reflect the strong declared support for site visits, some feeling that new social networking media should be tried and a concern that the emphasis should actually be on listening to the public rather than presenting a pre-determined industry position.

It may also pick up the views offered in the discussion on what the public needs to know, which favoured providing good, objective material for use by mineral planning authorities in consulting the public and explaining their policies in the public examinations of their draft plans.

Discussion at LWM4 and at UKMF also considered the clear voting preference for using television. This was undoubtedly a powerful medium. With a charismatic presenter and an imaginative storyboard focussed on a popular angle such as another window on the distant past, where the stone for an iconic building came from, or "if you can't grow it you have to mine it", TV could be effective.

Production companies and commissioning editors would, however, have to be convinced it could attract the necessary viewing audience without a documentary focus on a currently controversial issue. Some Open University-based popular TV ventures have achieved this, but there was some doubt as to whether the message on UK-won minerals could be attractively presented for mainstream

audiences. Even a supportive approach could not avoid dealing with aggregates and coal, which would be difficult to handle.

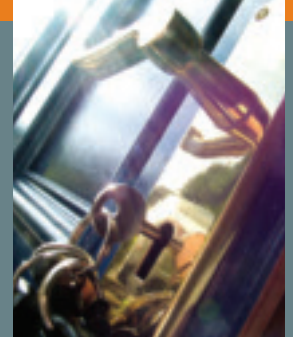
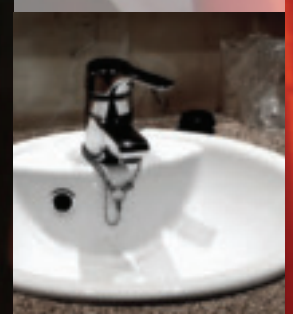
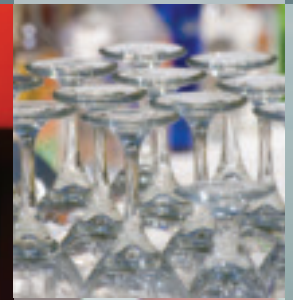
At UKMF's 10th meeting in November 2011, it was agreed that the various sets of information and communications resources prepared by WG3 would be completed, taking account of the discussion then and at LWM4. They would then be placed on appropriate websites.

The public information material is currently being completed and the guidance on communications techniques has already been placed on the British Ceramics Confederation website. Uploading by the other mineral trade associations and the Planning Officers Society is awaited.

However, finance (or industry assistance) would be required to source and provide the photographs and the professional web-design and presentation necessary to make the material visually appealing and thus fully effective for lay audiences. Similarly, further development of the trial educational pack and the possibility of including mineral working in A-level and GCSE syllabuses, initially carried forward in discussion with the Earth Science Teachers Association at a seminar in mid-May 2012, is also likely to require some commitment of resources if these initiatives are to become a reality.



UK Minerals Forum
c/o CBI Minerals Group
Centre Point
103 New Oxford Street
London WC1A 1DU
Tel: 020 7395 8059
www.ukmineralsforum.co.uk



UK Minerals Forum - Chairman: Dr Keith Duff. Members: Aggregate Industries | British Aggregates Association (BAA) | British Ceramic Confederation (BCC) | British Geological Survey (BGS) | Campaign to Protect Rural England (CPRE) | CBI Minerals Group | Confederation of UK Coal Producers (Coalpro) | Council for National Parks (CNP) | English Heritage | English Stone Forum | Environment Agency | Hanson Aggregates | Lafarge Cement | London Aggregates Working Party (LAWP) | Mineral Products Association (MPA) | Mining Association of UK (MAUK) | Mills and Reeve Solicitors | Natural England | Planning Officers Society | RSPB | Sibelco | Tarmac | The Crown Estate | Wildlife Trusts

Observers: Department for Business Innovation and Skills (BIS) | Department for Communities and Local Government | Department for Energy and Climate Change (DECC) | Department for Environment Food and Rural Affairs (DEFRA) | Department of Environment, Northern Ireland | Scottish Parliament | Welsh Assembly Government

Secretariat and funding provided by CBI Minerals Group

