ECI ANNUAL REPORT 2001

european COPPER institute

Table of Contents

The Chairman's Message	3
2001 Main Achievements	4
ECI Mission & Strategy	5
Interview with John Schonenberger, ECI Chief Executive	6
About Communication	7
About Electric & Electronic and Building Construction	8
About Environment and Regulatory Affairs	9
Financial Statement	10
Market Information	11
Copper, the Material for the Future	12-13
Copper and Sustainable Development	14-15
Key Industry Trends	16
European Copper Development Association Highlights	18-21
Accessing the Worldwide Network	22-23

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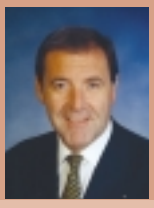
The Chairman's Message



Norbert Brodersen
KM EUROPA METAL AG

Virtually every European citizen benefits from copper. It is an integral part of our daily lives, for example in energy distribution, in heating and lighting, in our appliances, telephones and computers. The majority of us have copper tubes that provide drinking water for our families. And, we can all appreciate the beauty of a copper roof. At 4.7 million tonnes, European markets accounted for one third of the world's copper demand during 2001.

At year end, the twelve countries of the euro zone welcomed the arrival of the new euro currency. This historic event required the design, initial production and distribution of 52 billion coins, every one of which contained copper. The industry is proud that its products were chosen to meet the demanding requirements for appearance, security and human health.

Copper's corrosion and tarnish resistance will preserve the visual appearance and longevity of the new coins and will enable them to meet their thirty year design life. The unique electrical properties of the various alloys will facilitate the recognition of coins in vending machines, thus minimising the risk of fraud. And, as a naturally antibacterial material, copper will minimise the health and allergy concerns associated with the sheer magnitude of coin handling in everyday use.

A final important reason for copper's selection is its ability to be totally recycled, indefinitely and without any loss of performance. This property is essential to support the goals of sustainable development. The task of recycling billions of old coins will be significant, but all the metals will reappear, either as new coins, or in a whole host of metallic products.

Copper's involvement in such an extensive range of market end uses has resulted in its inclusion in many current and proposed regulatory directives. Through the European Copper Institute and its close links with Eurometaux, the industry is fully committed to working with the Authorities to address any concerns that may exist with our products. Discussions have continued throughout the year with the European Commission and the Member States on the voluntary risk assessment for our materials.

During 2001, ECI has continued to build the partnerships and strengthen the networks required to increase the efficiency and effectiveness of copper market promotion across West, Central and Eastern Europe. On behalf of the Board, I would like to thank you for your support and trust that you will continue to participate actively in ECI's efforts to both grasp the opportunities and to tackle the challenges ahead for the copper industry.

Norbert Brodersen

2001 Main Achievements

• The Europe-wide media relations campaign linking the major benefits of copper to the launch of the new euro coins. The campaign, incorporating airport and railway station publicity as well as media visits to copper facilities and National Mints, attracted major TV and print coverage.

• Finalising the internal processes and launching the industry wide data collection for the EU Voluntary Risk Assessment for copper and selected copper compounds.

• Launching the European Commission co-funded power quality initiative. ECI is leading a consortium of twelve industrial and academic partners in its role of becoming the recognised best practice source of power quality solutions across Europe.

• Promoting to the EU and several Member State regulators the importance of the bio-availability concept, including the use of the ICA funded Biotic Ligand Model, in setting European water and soil quality standards.

• Streamlining internal finance and accounting processes and using the savings to add resources in the critical Environmental, Health and Safety area. At year end, Ilse Schoeters joined ECI in the new position of Assistant Environmental Manager.

• Hosting an event at the European Parliament on December 18th, where ECI presented, on behalf of the copper industry, a bronze sculpture to commemorate "The Euro. Born out of Copper". More than 150 persons participated, including the Vice-President of the Parliament, David Martin, the Belgian Finance Minister, Didier Reynders, the European Commissioner for Economic and Monetary Affairs, Pedro Solbes Mira and the President of the European Central Bank, Wim Duisenberg.

Rodolphe Cogels, "The Euro. Born out of Copper"
The European Parliament - December 2001

MISSION & STRATEGY

Interview with John Schonenberger ECI Chief Executive

What have been the most positive indications of copper market growth during the last 12 months ?

Despite the general slowdown in the world economy, copper's unbeatable contributions to efficient power distribution, safe wiring in homes and communications have fuelled demand growth in the more developing areas of Central and East Europe.

ECI's market research has increased regulatory and consumer group awareness of the safety issues arising from the ageing of Europe's residential housing. Reflecting that two thirds are now over 30 years old, an estimated 70 million dwellings have unsafe electrical installations. An extensive renovation activity is required to stop unnecessary loss of life and to significantly reduce property damage.

How significant was copper's use in the new euro and what impact will the recycling of the old coins have on the market ?

While the minting of the new coins required 180,000 tonnes of copper, this represented less than 2% of European demand during 2000 and 2001. The recovery of the old national coins will provide 150,000 tonnes of copper for recycling. With >40% of Europe's copper supply coming from recycled materials, this quantity, spread over three years, accounts for less than 2.5% of annual demand.

The selection of copper by the European and Member State authorities, as the main metal in the new coins, was a positive endorsement of copper's anti-bacterial, technological and recyclable properties.

Looking forward, what are the key focus areas for the European Copper Institute in 2002 ?

On the market development side, reinforcing the important role that copper products can play in building an increasingly sustainable society. Programme content will range from focusing on copper's ability to reduce energy losses in electrical systems, thereby reducing greenhouse gas emissions from fossil-fuel power generating stations, through to promoting the full life cycle benefits of copper's long, maintenance-free, use in water distribution systems and roofing applications.

On the regulatory side, ECI will continue to lead the copper industry's voluntary risk assessment. This important activity, involving the European Authorities, seeks to understand and manage any risks that copper products may represent to human health and the environment.

About Communication

by Christian de Barrin, Communications Manager

Early in 2001, ECI's industry led Communications Committee revisited its strategies and actions for Europe. As a result, increased emphasis has been placed on raising the general public's level of awareness on copper's benefits to modern society. These actions are well aligned with ICA's new global branding initiative.

The launch of a new web site and ECI's Copper brochure, both in five languages, have provided a useful platform on which to develop a broader media relations based communications programme.

The increased use of copper in the new euro coinage provided ECI with an excellent opportunity to promote the key performance attributes of copper and its alloys. Copper's anti-bacterial and technological properties and its 100% recyclability were highlighted in the campaign launched in October. The campaign involved publicity in major European airports and railway stations, mixed with media visits to copper manufacturing facilities and National Mints in five countries. Significant TV, radio and press coverage resulted across Europe.

ECI also focused on developing closer relations with key European decision-makers during 2001. Included as part of the euro campaign, ECI presented a bronze sculpture to the President of the European Parliament to celebrate the launch of the euro. This event attracted over 150 senior guests from the European Parliament, the European Commission and the worldwide copper industry.

ECI's Communications function has also provided expertise into the main European market development programmes. An important objective is to link the various messages under a more common theme in order to maximise end-user impact. Specific assistance was provided on the programmes aimed at improving electrical safety standards in European homes and on emphasising copper's sustainable properties in the plumbing sector.

The Euro advertising campaign

www.eurocopper.org

" Le cuivre, métal idéal de la monnaie européenne antibactérienne "
Le Monde - November 2-2001

" Cuore di rame per l'Europa"
Il Sole 24 ORE - November 1-2001

" L'euro sera tout de cuivre revêtu "
La Libre Belgique - October 25-2001

" El cobre consigue que el euro sea una moneda 'redonda' "
Expansion - October 25-2001

" Aus Kupfer geboren "
Die Harke - Nienburger Zeitung
November 7-2001

Plumbing Industry advertising

About Electric and Electronic

by Hans DE KEULENAER, E&E Programme Manager

ECI's power quality initiative, co-funded under the European Union's Leonardo programme, was launched early in the year. Involving a mix of academic, commercial and CDA partners, this twelve member consortium has the target to save European business over 10 billion euro through improving the quality of power supplies in non-residential installations. New standards and system upgrading could create up to 30,000 new jobs in the electrical engineering sector and are estimated to add 60,000 tonnes of copper demand per year. ECI completed a survey of 16,000 dwellings, across eleven European countries, to better understand the current level of domestic electrical safety. Analysis showed that over 50%, ie over 70 million dwellings, could be classified as unsafe, or even very unsafe. Electrical fires account for over 600 lost lives and hundreds of millions of euro of property damage each year. Regulation will be a key element in an approach involving the inspection and renovation of ageing properties. Energy efficiency programmes continued to focus on motors and transformers. Realistic savings of 50 TWh/year, equivalent to the generating capacity of 6 large power stations, have been identified. Resultant savings in greenhouse gas emissions would total 20 million tonnes of CO_2 per year. A pilot motor programme started in Germany at year end. In the transformer area, ECI has been instrumental in the definition of a worldwide International Energy Agency initiative to raise product standards.

About Building Construction

by Nigel COTTON, Building Construction Programme Manager

Sales into the construction segment were impacted on three fronts during the year – the lower level of economic activity, certainly in Northern Europe, the improved performance of substitute products, specifically the composite tube and increasing political pressure on the environmental impacts of metal products in general. While the Regional Plumbing and Roofing campaigns maintained a strong emphasis on technical publications, professional education, major building exhibitions and selected advertising, focus was placed on better understanding and highlighting copper's performance benefits relative to competitive materials. Copper's role in significantly reducing the risk of legionella has been promoted to hospitals and Government health officials. Studies have been commissioned with leading contractors to update the life cycle inventory data for copper, as well as to extend life cycle thinking to incorporate the long life span and 100% recycling credits for copper products. A targeted market study was also carried out to determine the purchasing drivers for copper tubing versus competing products. Results will be heavily incorporated into the 2002 activities. Following the identification of the automotive sector as a key element in ICA's 2000 strategic plan, ECI worked with the German CDA (DKI) and a small group of major fabricators to kick off an activity to better understand the automotive development processes in Europe. Towards year end, increased emphasis was placed on ensuring a key role for copper components in the growing solar energy system market. Learnings from the earlier DKI pilot, along with new partnerships with leading system suppliers, were used to guide the early efforts.

About Environment

by Dr Katrien DELBEKE, Environment Programme Manager

The Voluntary Risk Assessment (VRA) for copper and selected copper compounds dominated the activities of ECI's Environment function during 2001. Detailed discussions were held with the European Commission and several Member States on the overall process, the roles and responsibilities of the review country and the mandate of the scientific peer review committee. More than fifty persons participated in an ECI workshop in April to launch the VRA activity. Initial data gathering has focused on the collection and evaluation of existing data on environmental and human health effects. The industry responded positively to the first requests for local exposure data. The availability of data is good for socio-economic information, local emissions and workplace air monitoring. On the research side, solid progress has been made on extending the bio-availability concept to the chronic state. It is now possible to predict both the acute and chronic toxicity of copper to algae and invertebrates in European surface waters. An extensive communications effort was undertaken to promote the bio-availability work with several EU Member States. By year end, there was major recognition that such a concept is critical to setting relevant water quality criteria for Europe. Science and communications efforts were also progressed on copper as an essential element to all life forms, on sustainable copper loading from sewage sludge application to agricultural soils and on the evaluation of emissions from copper products.

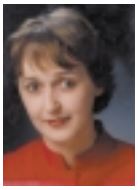
About Regulatory Affairs

by Thierry GERSCHEL, Regulatory Affairs Director

During 2001, ECI's Regulatory Affairs function was continuously involved in a broad range of issues. Significant effort was spent on contributing to Eurometaux positions on the European Commission's New Chemical Policy proposal. This policy has widespread consequences for copper products, a main component of which is to transfer the burden of proof for safe use firmly on to industry. Under the guidance of the ECPPC's Regulatory Affairs Task Force, ECI presented industry positions at several European Standards and Regulators working groups regarding the approval scheme for products in contact with drinking water. Debate continues on finding appropriate tools to deal with this highly complex issue. Major submissions were made on the EU directive concerning air emissions of arsenic, cadmium and nickel. Proposed levels were highlighted as non-achievable, even using best available technologies. The Commission has decided to repeat a cost/benefit analysis before finalising. During the final stages of the Zinc risk assessment, the Dutch Rapporteur identified emissions from brass casting as a potential risk area. ECI coordinated an urgent effort to collect industry data on this activity. After analysis, the Rapporteur concluded that no action was required. Following agreement at its Executive Committee, Eurometaux has approved a project to collect regular energy and emissions data from the non-ferrous industry. Copper was selected as the pilot. ECI has worked closely with the consultant to make use of a web based submission tool. Data entry and storage rules have been designed to protect all company proprietary data. Broad industry commitment to supply the required data is an important action during the first half of 2002.

Financial Statement

by Catherine MANTELL, Finance & Accounting Supervisor



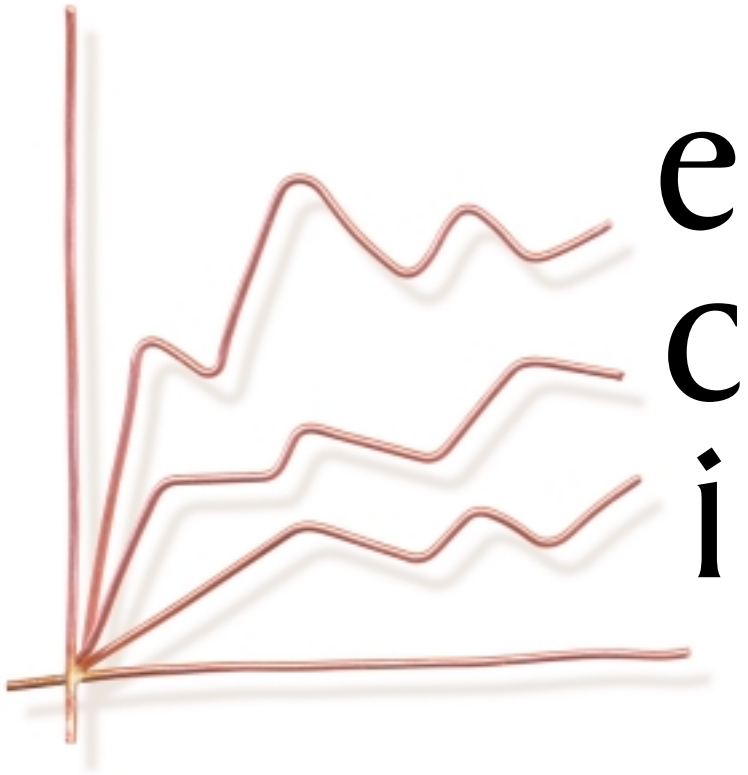
ECI's operating expenses for 2001 were down 2% from the prior year, primarily due to efficiencies in financial administration. The total budget for European promotional and defence programmes jumped 18% to 13.8 M$. Increased regional accountability for Environmental programmes added 10%, with most of the remainder supporting the expansion of activities into Russia and Turkey, as well as the costs of the "Euro. Born out of Copper" campaign.

2001 Operating Expenses (K euro)

Personnel	1003
Travel	189
Meetings	31
Office Costs	182
Telephone & Fax	15
Insurance, Legal & Audit	61
Total	1481

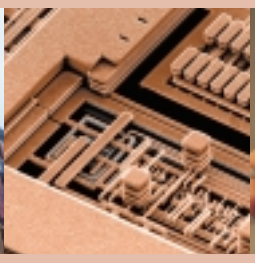
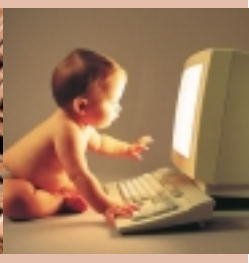
2001 European Promotion Funds (K dollar)

Strategic Initiative	ICA Funding	European Industry Co-Funding	Total
Plumbing	2,112	1,155	3,267
Roofing	1,169	160	1,329
Industrial	194	132	326
Electric & Electronic	1,451	112	1,563
Central & Eastern Europe	1,573	150	1,723
Environment	1,480	68	1,548
Communications	942	240	1,182
Copper Centre Network	949	1,878	2,827
Total Promotion Funds	9,870	3,895	13,765



MARKET INFORMATION



Copper
the Material for the Future

Copper is everywhere in our daily lives, delivering energy and communication services to our homes and our offices. Lights, telephones and computers all take advantage of copper being the most efficient transporter of electricity and high speed data amongst the non-precious metals.

Human transportation also requires copper. Approximately 2% of the weight of a passenger airliner is copper and can include 190 km of wires. The presence of increasing safety, communications and navigational aid systems in vehicles uses more than 25 kg in wiring and strip. The rapid expansion of Europe's high speed train network also uses copper alloy overhead cables for efficient power delivery, while each locomotive unit incorporates 10 tonnes of copper in its motors, transformers and ancillary parts.

The above examples demonstrate how copper's conductive, mechanical and alloying properties satisfy the needs of modern society. Incorporating the ability of copper products to be fully recycled at the end of their useful lives makes copper an ideal material for a sustainable future.

Copper — the metal of communication

Since the creation of electricity, the mobile phone has provided the easiest way to link humans around the world. The miniaturisation of the components required to deliver this technology at an affordable cost rely on copper's superior conductive and connective properties.

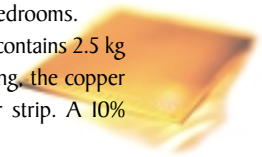
During 2001, an estimated 400 million mobile phones were sold worldwide. While a modern handset contains only 15 grams of copper, found in the connector strip of the loudspeaker, the touch buttons and the power connection, twenty times that weight are added in the battery charger, earpiece and wiring components.

With annual growth rates of 10 – 20% forecast for this segment, copper use by 2005 will approach 250,000 tonnes per year.

European Copper Institute

Copper — networking people

Copper brings high speed internet service to our doorstep and allows use of multi-media applications throughout the home. It is no longer sufficient to bring a single telephone line to one point. Increasingly, it requires distribution throughout the house, in the living room, the kitchen, the home office and various bedrooms.
More and more people possess a personal computer. On average, each contains 2.5 kg of copper – in the magnet wire, the internal and external electrical wiring, the copper foil in printed circuit boards or mother boards and in the connector strip. A 10% growth rate in PC sales is expected over the next five years.



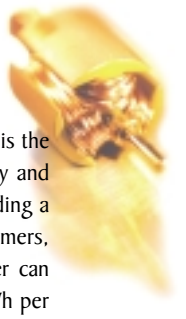
Copper — a partner of sustainable "green" energy

Copper's superior electrical efficiency makes it an essential component of renewable energy technologies (solar, wind and hydroelectric). Worldwide, the power generation from wind energy has increased 30% per year, over the last three years, and is now estimated at 3,600 megawatts per year, with more than 40% produced in Europe. In this high growth segment, copper demand for the generator, voltage transformer and distribution cabling approaches 4 tonnes per megawatt.

The new EU directive on the production of electricity from renewable energy sources came into force on September 27, 2001. A key objective is to source, by 2010, 22% of the EU's electricity demand from hydroelectric, wind and solar energy.

	Technology	Potential for a sustainable energy future	Copper's Importance	Where is the Copper ?
Renewable energy sources	Wind	**	***	Generator, motor, cable, transformer (4T/MW)
	Solar thermal	**	**	Heat exchanger, piping
	Solar photo-voltaic	**	*	Converter, LV cabling and grid connection
	Biomass & biofuels	**	*	Generator, cabling
	Hydroelectric	**	**	Generator, transformer, cable
	Wave power	Unknown	**	Generator, cabling for power collection & transmission
Efficient use of fuel sources	Co-generation	n/a	**	Generator, heat exchanger
	Heat pump	n/a	**	Heat exchanger, motor
	Waste-to-energy	n/a	*	Heat exchanger, motor

***very high - **high - *medium - Sources ECI 2001



Copper — generating and saving energy

As the most efficient electrical conductor, with the exception of silver, copper is the material of choice in electric power systems. By maximising energy efficiency and minimising heat losses, copper reduces greenhouse gas emissions thus providing a strong contribution to sustainable development. Designing motors, transformers, power cables and appliances with the economically optimum level of copper can reduce losses by as much as 25%. Across Europe, this could save over 50 TWh per year of electricity thereby reducing CO_2 emissions by over 20 million tonnes.

Copper and Sustainable Development

The goals of sustainable development will feature prominently in the 2002 World Summit to be held in South Africa in September. Sustainable development means ensuring that the needs of future generations can be met from sufficient resources within a healthy environment. Copper, sometimes referred to as "the green metal" plays a very important role in each of the following sustainable solutions:

How Copper Recycling contributes to Sustainable Development

Copper recycling offers important opportunities to conserve natural resources, minimise waste, and reduce energy usage.

Resource Conservation: Copper recycling has a strong positive impact on conserving natural resources for future generations. Copper is used, recycled, and reused. 40% of Europe's annual demand for copper is supplied by recycling. Furthermore, it is estimated that 80% of all copper ever mined is still in use today.

Waste Minimisation: Copper recycling generates little or even no waste. Pure copper scrap is easily melted in furnaces or smelters. Alloy and mixed scrap are processed in converters, where certain impurities and intermediate products are removed. Cable scrap, electronic etching solutions, electroplating sludge and catalyst residues can all be converted into new copper.

Energy Conservation: Copper recycling is not nearly as energy intensive as mining copper ore. Recognising that recycling requires collection and sorting, the amount of energy required to recycle copper is about 25% of that needed to convert copper ore to metal.

European Copper Institute

How the Energy Efficiency of Copper contributes to Sustainable Development

Wasted energy depletes our natural resources and requires fossil-fuel power plants to work harder. This results in more greenhouse gas emissions that contribute to climate change. As electricity flowing through copper wires meets far less resistance than in any other metal except silver, using more copper in high- and premium-efficiency motors, high-efficiency transformers, power cables and electrically efficient appliances can reduce energy losses by 25%. Copper also plays an essential role in exploiting renewable energy sources, such as solar and wind, by improving both the efficiency of use and in enabling renewable energy generation. While energy efficient products that contain more copper are often more expensive, the extra investment will more than pay for itself in reduced energy bills, usually within a short period of time.

How Copper's use in Solar Energy contributes to Sustainable Development

At the heart of many commercial systems for space heating and water heating, copper has proven that the sun's energy can be harnessed effectively and economically. Copper solar collectors can heat water to over 70°C (160°F), thereby reducing the need for fossil-fuel energy resources. This conserves energy and reduces greenhouse gas emissions. Copper conducts heat and resists corrosion better than any other engineering metal. Its thermal conductivity, resistance to atmospheric and aqueous corrosion, workability, sealability and durability are key to making solar collectors and heat exchangers cost-effective.

How Copper's Durability contributes to Sustainable Development

Copper is extremely durable. In ancient times, copper was used in products designed to last more than a lifetime. For example, copper tubing in the water plumbing system in Egypt's ancient Cheops Pyramid is intact and serviceable after 5,000 years. Copper cooking ware and artefacts in museums, dating back some 50 centuries, have also stood the test of time. Today, products containing copper are made to last from several years to up to 150 years, depending upon the application. The durability of copper remains an important sustainable benefit, providing designers and users with lower operating costs and negligible environmental impact during use.

Copper
100% recyclable
without any loss of performance.

Key Industry Trends

Worldwide, the demand for copper has doubled since the early 1970's. Due to a general slowdown in the world economy, 2001's refined tonnage of just below 15 million tonnes was down 4% from 2000's record level. In Europe, demand of around 4.7 million tonnes reflected a similar level of slowdown within the EU, but was offset by sustained growth in Central and East Europe.

Which segments offer the best prospects ?

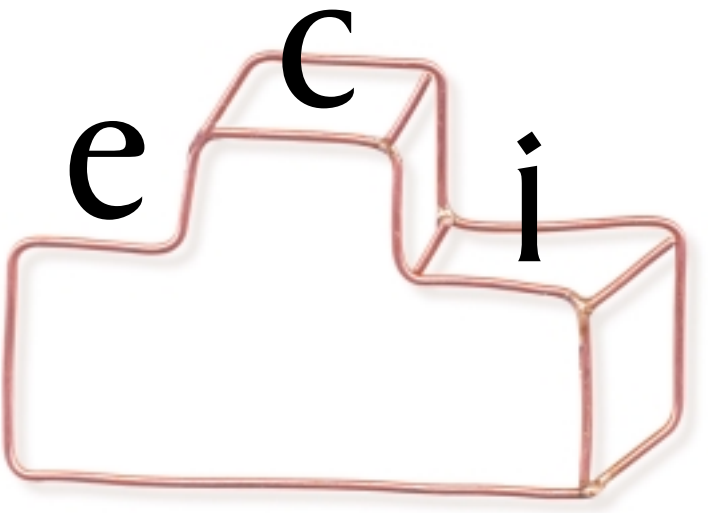
The view of ECI's two Programme Managers - Hans De Keulenaer (Electric & Electronic) and Nigel Cotton (Building Construction):

Application	Market Size	Trend in copper usage	Drivers
Electrical appliances	***	↗	-rational use of energy -increasing diversity of appliances
Electrical installations	***	↗	-safety through renovation -power quality
Engineering	***	↗	-machinability -lifetime costing
Sanitary & heating distribution systems	**	→	-modern installation techniques -bacteria resistance
Industrial equipment	**	↗	-rational use of energy
Transport, including automotive	**	↗	-vehicle safety and comfort -rail network expansion -rational use of energy
Architectural applications	*	→	-design flexibility -emerging market growth
Renewable energy systems	*	↗↗	-reduction of emissions -building sustainable energy future
Data wiring/ smart home	*	↗↗	-smart office -home office working
Power distribution	**	→	-deregulation -embedded generation
Electronics	*	↗↗	-laws of physics

* < 5%

** 5-10%

*** >10% of total



EUROPEAN COPPER DEVELOPMENT ASSOCIATION HIGHLIGHTS

European Copper Development Association Highlights

Copper Benelux - Belgium

Electrabel, the leader in energy distribution across Belgium, invited Copper Benelux to present a paper to 1500 professionals regarding the role that copper tubes can play in significantly reducing the risk from legionella. A major Dutch newspaper also printed a two column article on this increasingly important issue.

More than 360,000 people visited the leading Belgian building/DIY exhibition, Batibouw 2001. For the first time, the CDA stand covered the whole range of copper end-uses (architecture, plumbing, electricity and interior decoration).

As a result of a targeted advertising campaign aimed at end-users, visitors to the local website increased by a factor of five.

Centre d'Information du Cuivre - France

CICLA continued a full service approach to the roofing market during 2001. Activities included visits to architects and roofing companies, on site technical assistance, regional exhibitions, training and media relations. A new publication "Build with Copper" highlighting the full range of roofing, cladding and guttering was launched during the summer. Content included both design ideas and technical considerations. More than 1500 visitors registered on CICLA's stand at the major Batimat exhibition in Paris. Figures indicate an additional 10% tonnage growth versus 2000.

A new initiative launched in 2001 focused on the gas piping segment. A series of six regional seminars was provided to staff from Gaz de France. Two partnership contracts were established with the Building Trade Associations in the Ile de France and Central regions. Of specific interest was a new brochure to promote alternate materials to substitute lead in water tubing renovation. Four targeted issues of a new publication on copper's use in underfloor heating were distributed.

A major media relations effort targeted electrical safety in the home. ECI's communications function assisted in securing significant radio, television and front page newspaper coverage. Many French associations fully supported the key inspection and renovation approach.

Deutsches Kupferinstitut - Germany

The DKI's pilot programme on solar energy systems was highlighted as a growth opportunity for other countries at the annual ICA meeting. Two new publications on "Solar heating and Architecture" and "Brass Opportunities" were completed. The DKI also organised a third student competition on brass interior decoration. A key component of the national learning programme, "The correct installation of copper tubes", was updated and re-published in print and CD format.

The DKI was actively involved with ECI in kicking off ICA's new strategic initiative on automotive opportunities in Europe. Initial efforts have focused on understanding European development processes and collecting baseline use data. A European fabricator panel has been set up to guide this work.

Local promotional activities strongly supported ECI's "The Euro. Born out of Copper" campaign. A quiz on the world of copper was organised with a major TV

magazine "Gong", which reaches 1.2 million readers each week. 15,000 entries were received for the three week, thirty question quiz. A major TV station presented a programme on "farewell to the pfennig". A live interview was held with the DKI Communications Manager, highlighting copper's important benefits and the audience was invited to call in to become a pfennig millionaire (5,000 $).

Hellenic Copper Development Institute - Greece

The HCDI's annual Copper Day was again a great success. More than 800 people attended the November 14th event in Patra. All major end uses were covered by a number of well respected professionals from the building and electrical industries.

A new publication focusing on copper piping in natural gas was distributed to the professional community via the various Plumbing Associations across Greece. A new, technically oriented, roofing manual was distributed to Universities, Architect Associations, Roofing contractors and The Ministry of Works.

In the electrical area, the HCDI translated and disseminated a number of key ECI publications on earthing practices and trolley wire.

Hungarian Copper Promotion Centre - Hungary, Czech Republic and Slovakia

In addition to managing the main promotional programmes, the HCPC focused on messages relating to copper's image, its environmental benefits, its importance in the exploitation of renewable energy sources, as well as on health and nutrition issues. Messages were communicated via TV, radio, the print media and at public events like the "Copper in our life" exhibition in Brno.

A "Building Renovation with Copper" conference was organised in Budapest integrating all copper opportunities into the State supported renovation and development programme. In Slovakia, broad publicity was given to the new national regulation on copper tubing in gas installations.

In the professional education area, a tri-lingual CD-ROM on copper roofing was presented at the HCPC's architectural event in Prague, a nation-wide copper competition was organised for future professionals in the Czech Republic and 860 plumbers attended the Centre's plumbing courses across the three countries.

Istituto Italiano del Rame - Italy

The IIR continued a broad promotional programme during 2001. A major emphasis was on highlighting the environmental, health and energy saving benefits of copper tubing, roofing and interior decoration products towards professionals across the Building Construction sector. Working with the local ECPPC campaign, the IIR carried out a major publicity effort aimed at hospital management on "Copper versus Legionella".

A new copper-framed stand was used at five major regional building and plumbing exhibitions. Two large education conferences were held in Taranto and Pisa and several seminars were organised through local trade associations.

The IIR was fully involved in the European Leonardo power quality and the casa sicura electrical safety in the home projects.

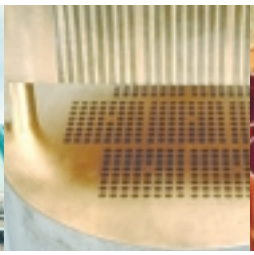
Polish Copper Promotion Centre - Poland

Changes in the management and examination standards for vocational schools in Poland opened the door for revised training modules. The PCPC signed an agreement with the Ministry of Education to prepare new education and examination standards for copper in plumbing and roofing.

The PCPC coordinated an activity with the copper tubing and fitting industries to form an Association for Copper Tube Installation Quality. Efforts were made to raise awareness of the problems expected through the use of low quality products.

In cooperation with the Technical University of Wroclaw, the Association of Polish Electrical Engineers and the Polish Standardisation Committee, the PCPC launched a new initiative to improve the standards of electrical installation in residential buildings. New guidelines, comparable to those in the European Union, were established both for new build and renovation.

The PCPC assisted ECI's Central European Electrical Manager in setting up a new website showing the on-line performance of four new high efficiency transformers in the national electricity grid. Real time energy and cost savings can be monitored by remote wireless links.



European Copper Institute, Representative Office - Russia

Preliminary 2001 figures indicate a 30% increase in Russian domestic copper use versus 2000. New Government legislation, allowing only copper wiring to be used in new housing, has been a key growth component. The focus of ECI Moscow's first year of operation has been on market segments with little history of copper use, ie tubing and roofing.

Local industrial companies have participated in quarterly meetings to help guide the early promotional efforts. Useful documents from the Polish and Hungarian Centres have been translated and disseminated by local partners. Copper awareness seminars have been hosted for Moscow architects and the local and importer tubing companies have initiated a joint activity to secure a State endorsed Copper Plumbing Norm.

Given the huge size of Russia, ECI Moscow has set up a comprehensive local language website to spread the copper message.

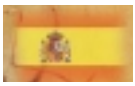
At year end, efforts were started to promote ICA membership benefits to the leading Russian producers.

Scandinavian Copper Development Association - Scandinavia

The main focus of the SCDA during 2001 was to continue to respond to the increasing flow of negative information on metals in the environment. Discussions with ECI and a local public relations company led to the introduction of a number of different actions to raise the level of public debate, including a letter sent by ECI to the Swedish Environment Minister. Towards year end, several print media have started to report on the metals issue – early indications are of a more balanced perspective on these issues.

Detailed submissions were made on the Stockholm Environmental Programme for 2002-2006, which proposed severe restrictions on copper in tubing and roofing end-uses. Arguments were made based on the results from ICA sponsored research programmes.

Centro Español de Información del Cobre - Spain, Portugal



CEDIC was very pleased to welcome two new members during 2001 – La Farga Lacambra and Tubo Técnico Europeo.

Four more seminars on harmonics, including a first one in Portugal, brought the total participants in the two year programme to 2,400. CEDIC has also prepared 4 of the first set of best practice modules for the ECI led Leonardo power quality project.

In close cooperation with the national ECPPC campaign, CEDIC has exhibited at a number of regional building exhibitions. All major end uses have been promoted. CEDIC has also initiated a new project in the solar energy sector to take advantage of a strong new build market activity in Spain.

At mid year, Julio Segura retired after 28 years as CEDIC Director. His friends and colleagues wish him a long and healthy retirement.

Copper Development Association – United Kingdom

CDA UK's focus for the year continued to be the training of technical decision makers through seminars and technical literature promoted by direct mailings, trade press coverage and exhibitions. The four one day "Design in Brass" seminars, co-hosted by the UK Department of Trade & Industry, attracted quality audiences of designers and engineers and resulted in several substitution opportunities.

The Leonardo power quality partnership raised its profile through the successful participation at the Drives & Controls exhibition and the delivery of ten nation-wide "Harmonics in Power Installations" seminars.

The 9th UK Copper in Architecture awards were an important activity, with the quality of entries higher than ever, an increase in the attendees at the awards ceremony and increased press coverage of the event and the winning projects.

COPPER DEVELOPMENT ASSOCIATIONS & REGIONAL OFFICES

EUROPE

Copper Benelux – Belgium
www.copperbenelux.org

Centre d'Information du Cuivre – France
www.cuivre.org

Deutsches Kupferinstitut e.V. – Germany
www.kupferinstitut.de

Hellenic Copper Development Institute – Greece
www.copper.org.gr

Hungarian Copper Promotion Centre – Hungary
www.hcpcinfo.org

Istituto Italiano del Rame – Italy
www.iir.it

Polish Copper Promotion Centre SA – Poland
www.miedz.org.pl

Centro Español de Información del Cobre – Spain
E-mail: cedic@pasanet.es

Scandinvian Copper Development Association – Sweden
www.scda.com

Copper Development Association – United Kingdom
www.cda.org.uk – www.brass.org

European Copper Institute Representative Office - Russia
www.eurocopper.ru

ASIA

Copper Development Centre of Australia Ltd. – Australia
www.australia.copper.org

International Copper Association Ltd. Shanghai – China
E-mail: icash@public7.sta.net.cn

International Copper Association Ltd. Beijing – China
E-mail: icab@public.bta.net.cn

International Copper Promotion Council, Mumbai – India
www.copperindia.org

Indian Copper Development Centre, Kolkata – India
www.indiancopper.org

Japan Copper Development Association – Japan
www.jcda.or.jp

Copper Development Centre – South East Asia – Singapore
www.copper.org.sg

AFRICA

Copper Development Association (Pty) Ltd. – South Africa
E-mail: copdevsa@icon.co.za

LATIN AMERICA

Instituto del Cobre – Argentina & Uruguay
www.cobreinfo.com

Procobre – Instituto Brasiliero Do Cobre – Brazil
www.procobrebrasil.org

Procobre – Centro de Promoción de Usos del Cobre – Chile
www.procobre.cl – www.clubdelcobre.cl

Procobre México – Centro de Promoción del Cobre – México
www.procobremexico.com

Procobre Perú – Centro Peruano de Promoción del Cobre – Perú
www.procobreperu.org

Procobre Venezuela – Venezuela
www.procobrevenezuela.org

NORTH AMERICA

Canadian Copper and Brass Development Association – Canada
www.coppercanada.ca

Copper Development Association – United States
www.copper.org

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