

Copper Connects Life™

2002

**European Copper Institute** Annual Report





## The Chairman's Message

This is a challenging time for the world's copper industry. The slowdown in the economy has prompted further corporate restructuring and resulted in significant demand reduction.

Effective promotion and defence of copper therefore become even more important. The positioning of our products against competitive materials and the responses to EU regulatory developments require the industry's continued support for ECI's activities. This report covers the many successes achieved.

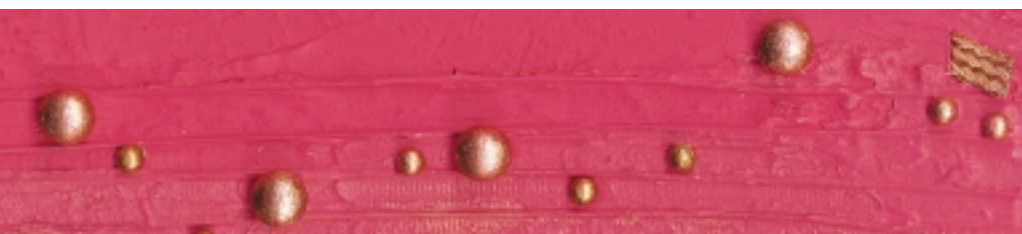
The industry has committed to carry out a voluntary EU risk assessment for copper and certain copper compounds. Providing a transparent assessment of the impact that our products may have on the environment and on human health, while at the same time promoting the economic and social benefits, is a clear sign of this industry's commitment to product stewardship and social responsibility.

The new euro coins and the Johannesburg Summit provided solid platforms for ECI to succeed in raising public awareness of the benefits delivered by copper products. Leading media showed copper's role as an essential element for human health, its 100% recyclability and its superior electrical conductivity, making it the material of choice for improving electrical energy efficiency, thus reducing CO<sub>2</sub> emissions.

ECI has broadened its interactions with other organisations and downstream sectors. New links have been made with important copper end users, including the solar thermal, automotive and wire & cable sectors.

ECI's members have approved significant changes to the Institute's membership structure, funding and governance. Implementation will come into effect, across Europe, on January 1st 2004. We are convinced that this will enable the copper industry to unite behind the common voice necessary to ensure its future success.

I would like to thank the ECI staff for their ongoing creativity and commitment and all member companies and the International Copper Association for their broad support.





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# 2002 Main Achievements

## **New strategic partnerships enhance the Electric & Electronic Programme**

A strategic shift within the E&E programme has resulted in broader ECI involvement in associations with common interests, such as improving energy efficiency and improving safety and convenience in modern homes. Copper tonnage influenced as a result of the last five years' efforts is estimated at 20,000 tonnes for 2002.

## **Important results through the launch of automotive and solar programmes**

ECI's automotive research programme provided the first project to be funded under ICA's new Technology initiative. ECI's involvement in the restructuring of the associations representing the European solar thermal industry has provided ECI with an Advisory Board seat. Copper will be emphasised as a material of choice.

## **The Italian Government agreed to act as the review country of the Copper VRA**

The voluntary risk assessment (VRA) remained one of ECI's most important projects. The Italian Government agreed to act as the review country and an independent peer review panel of seven leading European scientists was formed.

## **Significant media coverage out of pan-European media relations strategy**

Copper's essential benefits to sustainable development and to technology were highlighted in ECI's euro advertising campaign. Three other significant media events, in Spain on copper recycling, in Sweden on copper's vital role to human health and in the Netherlands on copper's leading role in improving energy efficiency, achieved excellent print, TV and radio coverage.

## **Members agree new ECI structure**

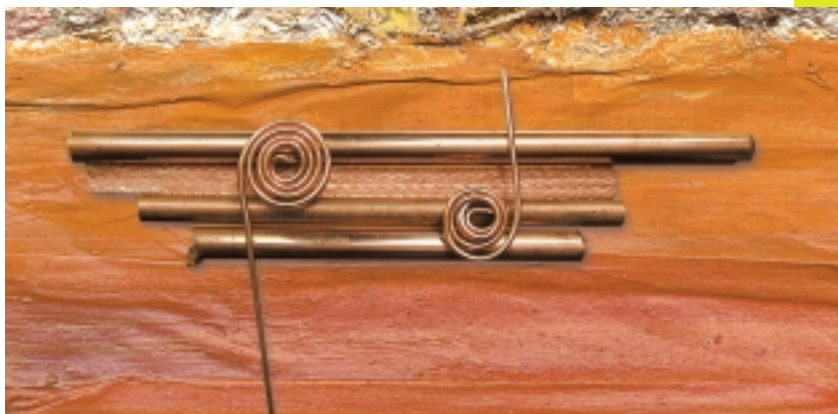
The ECI Board endorsed a restructuring of copper promotion across Europe. Starting on January 1st 2004, the new model includes broader end-user industry involvement, simplified administration, closer coordination with the local Copper Development Associations and a harmonised approach to funding.





# ( Activities & Achievements





## 3 Questions to ECI's Chief Executive

### What were the main challenges facing European copper markets in 2002?

Aside from the general economic slowdown, the main challenge was the increasing pressure from European and national regulations. Copper's important benefits to society and to sustainable economic development are not sufficiently recognised to balance the Regulators' increasing use of the precautionary principle. Research also showed that a large percentage of the general public, as well as several downstream users, had little understanding of the real benefits provided by copper products and did not view copper as a particularly important material for the future.

### In response to those, what would you consider ECI's major achievements?

ECI is now half way through the initial stages of a voluntary risk assessment for copper. In line with EU guidance requirements, this will use quality-controlled science to identify any potential risks posed by the manufacture and use of copper products on the environment and on human health. Secondly, ECI obtained significant print, radio and TV media coverage, raising public awareness on copper's benefits to modern living. And thirdly, new partnerships have been set up with innovative end-users, including the automotive, electrical systems and solar thermal industries.

### Looking forward to 2003, what are the highest areas of priority for ECI?

Through its expanded partner base, ECI will be reinforcing copper's key role in improving the efficiency, availability and safe use of electrical power. Within the area of regulatory and competitive product threats in addition to the Risk Assessment, a key focus will be to continue co-operation with EU regulators and standards authorities on confirming copper as a material suitable for general use in the distribution of drinking water.

>> John Schonenberger ECI's Chief Executive





## About Building Construction



While ECI's programme remained focused on plumbing and architectural enduses, a number of new copper growth avenues were opened up during 2002.

Copper tubing and fittings maintained a leading position in the European drinking water and heating system markets. ECI's promotional activities included training young plumbers, trade press advertising, newsletters, brochures and school kits. Responding to a number of local authority concerns, ECI and its members successfully promoted the benefits of copper in substantially reducing the risk of Legionella outbreaks.

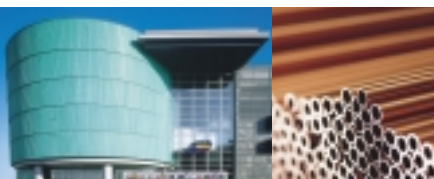
ECI is heavily involved in the ongoing development of the European Acceptance Scheme for products that come into contact with drinking water. ECI upgraded its management processes to help guide the development of common industry positions and has actively engaged in lobbying regulators and other stakeholders.

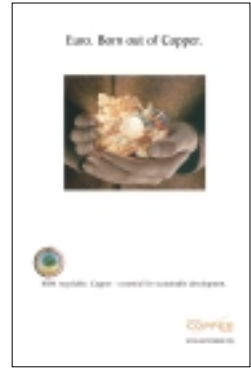
The scope of the former roofing campaign was broadened into the European Copper in Architecture Campaign. This is now promoting a broader range of copper and brass exterior applications to architects, designers and engineers.

In new areas, ECI's automotive team completed a study on growth opportunities in the automotive industry. A joint development project with a major automotive company was the first to be signed under the umbrella of ICA's new Technology Initiative. Other cooperation projects have been identified in the areas of recycling and product stewardship.

In the Solar Thermal market, ECI assisted in the restructuring of the supplying industry's European representative bodies. A "Train the Trainer" scheme has been piloted in Spain to explain copper benefits to solar system designers and installers.

>> Nigel Cotton Building Construction Programme Manager





## About Communications

E CI achieved significant success in raising general public awareness on copper's benefits to modern living. Copper messages were present in many national and several leading European publications, as well as on radio and major TV networks.

The campaign to promote the benefits provided by copper in the new euro coins was successfully completed. Adverts in major European airports and railway stations emphasised copper's recyclability and its use as a material for new technologies.

In Spain, copper's recycling properties were demonstrated through the recycling of the old Irish and Spanish currencies. Within the Electrical Programme, a press conference was held on improving domestic electrical safety standards in Europe.

In the Netherlands, copper's leading role in improving energy efficiency was communicated to the media in partnership with Siemens and the International Union of Electricity. Using the example of wind energy, key copper messages were used in a 3-minute CNN world report. In Sweden, as an important pilot for ICA's Branding campaign, ECI managed a major press conference introducing copper's benefits throughout the human life cycle.

ECI has worked with seven CDAs to set up a network of local media relations' agencies. These are being used to disseminate simple messages aimed at raising the general public's appreciation of copper's benefits to life.

In partnership with CDA UK, ECI has developed 4 Education e-sources. Linked to the National Curriculum, these will raise school children's awareness of copper.





Co-funded by the EU's LEONARDO Education programme, ECI's Power Quality Initiative aims to improve business efficiency by increasing the quality and availability of electrical power. Running in 12 countries, it includes 50 industrial and academic organisations and has the target of saving 10 billion euro/yr across Europe. New standards and system upgrading could create up to 30,000 new jobs in the electrical engineering sector, adding 60,000 tonnes of copper demand per year.

ECI has led the development of a European position paper aimed at improving electrical safety in residential housing. Partners are the International Electricity Union, the Association of Electrical Installers, Europacable and the International Federation for the Safety of Electricity Users. The paper proposes a regulatory framework to resolve the problem of 90 million unsafe dwellings. The programme will encourage, through inspection, a significant increase in the electrical renovation of properties over 30 years old. Success would save 6,000 lives over the next decade and is conservatively estimated to add 20,000 tonnes per year of copper wiring.

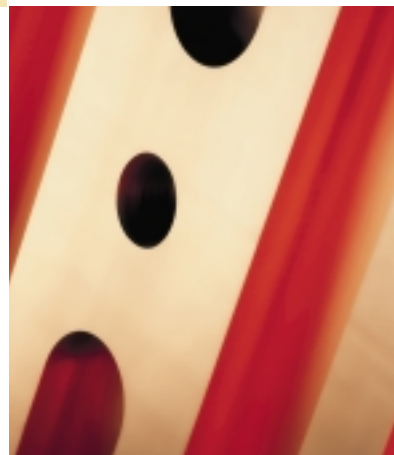
ECI was strongly involved in the EU's Motor Challenge Programme, a voluntary initiative for industry to increase efficiency in motor-driven systems. ECI also organised the 3rd International Workshop on distribution transformer efficiency. This led to the establishment of a venture of 20 partners, with the aim of achieving global savings of 150 TWh/year of electricity, equivalent to reducing CO<sub>2</sub> emissions by 100 million tonnes per year.

ECI co-founded the European Club of Chief Editors (ECCE). With 150,000 monthly readers, across 12 countries, these 14 editors of leading Electrical Engineering publications aim to make ECCE a channel to market for best practice in the electrical sector.



>> Hans De Keulenaer E&E Programme Manager

About  
Electric &  
Electronics





## About Environment



>> **Dr. Katrien Delbeke** Environment Programme Manager

The voluntary risk assessment for copper and specific copper compounds dominated ECI's environmental activities during 2002.

The most important regulatory process achievements were the endorsement of the voluntary process by the EU authorities, the agreement by the Italian Government to act as the review country and the appointment of an independent scientific peer review panel. All of these are critical in developing a sound and credible basis for the initial risk assessment report to be presented to the EU at the end of 2004.

The results of ICA funded research have been used to gain regulatory support for new risk assessment methodologies specific to naturally occurring, essential metals. The concept of bioavailability and the usefulness of the Biotic Ligand Model have been widely promoted to Governments and at leading scientific conferences. These will be crucial for the setting of relevant environmental quality standards for water, soil and sediments. Communications were targeted at persons active in the risk assessment and water quality standards areas both at national and European level.

The industry has contributed to an extensive data collection exercise. Information was collected on worker occupational exposure and on the emissions, to water, soil and air, from copper and copper compound producing and fabricating companies. Quality controlled information was also gathered from the literature on the effects of copper on humans and on other living organisms in the environment. Additional research to fill data gaps is ongoing.



E CI continued to monitor EU regulations with potential impacts on the copper industry and its markets. With input from the industry, positions on over 20 separate items were maintained and promoted - many through Eurometaux and the National Federations.

Proposed ambient air legislation remains a concern for the industry. Firstly, excellent progress was made on changing proposed limit values for arsenic, cadmium and nickel into targets. The proposals were well in excess of what industry can achieve using Best Available Techniques. These targets have since been withdrawn and replaced by a need for continued monitoring.

E CI has continued its lead role in the 3EMi initiative. This collects energy consumption data for the manufacturing of copper products. A pilot of thirty copper sites has fully tested the web based submission tool. Data collection will now be extended to provide historical performance.

Significant time has been spent participating in the various EU regulatory and standards committees addressing "Construction Products in Contact with Drinking Water". Several groups of experts from the copper industry are active in preparing for these complex discussions.

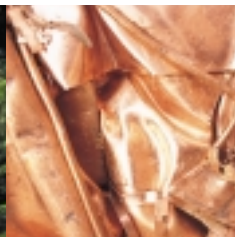
In a first revision to the End of Life Vehicles Directive, copper lobbying was unsuccessful in reversing the exclusion of leaded solder for non electric components, used for assembling copper-brass radiators, and on increasing too severe a limit on cadmium as an impurity in alloys. A similar concern on impurity levels exists under the Electric and Electronic Waste Directive.

E CI has been fully involved in the Management Team of the EU Zinc risk assessment. Data was collected from the brass producing industry on emissions into local waters and sediments. The final report and conclusions from the Dutch Rapporteur are expected in mid May.



## About Regulatory Affairs

> **Thierry Gerschel** Regulatory Affairs Director



## Financial Statement

The 2002 cash budget for copper promotion and defence across Europe totalled 14.3 M\$.

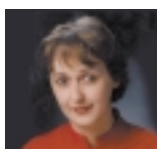
Of this total, 70% were provided by the International Copper Association, which represents more than 80% of the world's copper mining industry. Of the remainder, 27% were provided by the European copper industry, either into European programmes, through ECI, or into national programmes through membership in the local Copper Development Associations. The balance of 3% came from European Union funding of the LEONARDO Power Quality Initiative.

The distribution of funds across the main market areas can be seen in the table below. Network operations include programme planning; the provision of independent regulatory, product and market advice to copper users; member relations and administrative costs.

In addition to cash contributions, several European members contributed significant work in kind, specifically to the architecture programme (800 K\$) and to the data collection part of the copper risk assessment. The end user and academic partners in ECI's Electric & Electronic programme also contribute substantial human resources into project planning and execution.

### 2002 European Promotion Funds (K\$)

Strategic Initiative	ICA Funding	Local Co-Funding	Total
Plumbing	1900	1075	2975
Architecture	1449	126	1575
Industrial Applications	239	131	370
Electric & Electronic	2115	439	2554
Central & Eastern Europe	996	387	1383
Environment	1660	0	1660
Communications	747	84	831
Network Operations	1008	1960	2968
<b>Total Funds</b>	<b>10114</b>	<b>4202</b>	<b>14316</b>





# European Copper Development Associations' Activities







### *Copper Benelux – Belgium, Luxembourg, Netherlands*

Activities have focused on promoting copper's sustainable properties and defending markets against environmental threats. Participation at Batibouw, the annual building fair, attracted broad interest from the public and media. The copper Art awards for young plumbers provided an important communications opportunity towards this key audience. The promotion of copper's role in reducing the growth of legionella and on the need for additional sockets in residential properties were used to support an effective information campaign reaching more than 2,600 architects and designers. Copper Benelux was also fully involved in ECI's media event "Copper is blowing in the wind", held in the Netherlands in partnership with Siemens.



### *Centre d'Information du Cuivre – France*

A 2001 French decree on drinking water, requiring the replacement of all lead pipes by 2003, provided a unique opportunity to communicate copper's natural properties. A brochure was distributed to 10,000 decision makers and opinion formers describing alternative plumbing materials, such as steel and plastics, while promoting copper as the preferred solution. Copper tonnage in roofing grew for the eighth year in a row, supported by a new technical publication focused on gutters. In the electrical area, the French network positively welcomed the results of the regulatory survey on the periodic inspection of residential properties. This will be used to support a strong European wide lobbying programme. Three major component manufacturers signed up to the national LEONARDO Power Quality Initiative partnership.



### *Deutsches Kupferinstitut – Germany*

Communications activities were strongly enhanced via the launch of a redesigned website, now providing an additional general public focus. An expanded copper press club extends coverage beyond the technical press to more of the general media. Proactive projects included a pilot scheme for the promotion of the use of energy efficient motors. Major defensive work was carried out to counter regulatory threats against copper's broad freedom of use in drinking water and external architecture markets. The DKI actively participated in the European automotive programme, as well as managing ICA's life cycle inventory project aimed at delivering authoritative environmental data on copper products to designers and specifiers. It also celebrated its 75-year anniversary with an exhibition called "Copper - a metal with a future".





### *Hellenic Copper Development Institute – Greece*

Promotional activities were focused mainly on copper opportunities linked to the 2004 Athens' Olympic Games. Copper was successfully added into the specifications for drinking water piping (originally only plastics were listed). A new CD-ROM for the engineering sector promoted copper as the material of choice for domestic installations in the expanding natural gas supply network. As part of the European campaign strategy, the education of young professionals was increased, with 2,500 students taking the opportunity to learn and practice on copper tubing. In the highlight of the year, the Greek Copper Day, held this year in the Northwest, attracted more than 1,000 participants. Expert speakers covered plumbing, electrical and environmental topics.



### *Hungarian Copper Promotion Centre – Hungary, Czech Republic and Slovakia*

Programmes continued to focus on reinforcing copper's performance benefits to professional decision-makers. Tools included training courses, technical publications and trade press advertising. A re-designed website, in the three national languages, achieved a 300% increase in visitors. A targeted mailing was sent out on copper's sustainable development and anti-bacterial properties to correct mis-information put out by a competitive product. Copper friendly messages on recycling, environment, health, nutrition and safety were included on the HCPC stand at the Construma building exhibition. The first modules of the LEONARDO Power Quality Initiative were distributed to professionals involved in the design and installation of wiring systems for commercial premises.



### *Istituto Italiano del Rame – Italy*

Copper's contributions towards the concept of bio housing were shared with 1,400 architects through 16 conference seminars. Bio housing incorporates the importance of copper's sustainable and anti-bacterial properties in building an environmentally sustainable society. The Italian Authorities requested advice on energy savings, with the IIR providing information on high-efficiency transformers and motors. The newsletter "Rame Notizie" supported a continued emphasis on professional training across a broad range of copper applications. The electrical programme focused on promoting awareness, mainly to young electricians, on the regulations covering safe electrical installations in domestic properties.





### ***Polish Copper Promotion Centre – Poland***

Copper intensive elements from the LEONARDO Power Quality Initiative and ECI's residential safety programme were included in new standards for electrical installations in buildings. Following authority approval, these were promoted through the PCPC's local partner network. The energy and cost saving benefits from high efficiency transformers were shown online on the Supertrafo website. In plumbing, a new Copper Training and Examination Centre was opened. More than 100 plumbers and distributors were trained on the latest water and gas plumbing standards and systems. A new roofing standard was developed and a training accreditation scheme for installers set up with a local academic partner. End users were reached through a range of activities including major trade exhibitions, publications and seminars.



### ***ECI Representative Office, Moscow – Russia***

A project, involving local and European fabricators, has been started to develop a State copper plumbing code. This will be supported by new installation guidelines. A contracted study showed the clear freeze-break performance benefits of copper systems. These activities, along with publications translated from elsewhere in the network, were used to attract over 120 designers to a first ever copper plumbing conference. ECI has persuaded the Building & Construction Ministry to evaluate copper as an alternative material to be used in the huge, above ground market for natural gas distribution. Early promotional work in the architecture area has resulted in a significant number of new copper roofs across Moscow. An important effort was carried out to encourage the Russian producers and fabricators to participate more formally in ECI's activities.



### ***Scandinavian Copper Development Association – Denmark, Finland, Norway and Sweden***

Environmental issues continued to dominate the SCDA agenda. Important success was achieved with the re-opening of dialogue with the Government at a meeting between the Swedish Ministry of Environment, ECI and the SCDA. The Stockholm City Environmental Board was also persuaded to delete the most negative items on copper from its 2002 – 2006 Environmental Programme. The SCDA hosted a scientific workshop on the bioavailability of metals in aquatic environments with Swedish scientists and regulators and a very constructive meeting was held with the Finnish Environment Institute on bioavailability and the ICA funded Biotic Ligand Model. The SCDA also hosted the pilot for ICA's branding campaign on Copper in Human Health. This received extensive coverage in leading Scandinavian publications.



### *Centro Español de Información del Cobre - Spain, Portugal*

CEDIC participated in a multi-association work group to analyse a new Spanish law on "legionella prevention and treatment". Several suggestions were made to the Government. CEDIC has also independently carried out extensive promotion of copper's benefits, in minimising the risk of legionella formation, following a number of high profile occurrences. 2,000 persons visited CEDIC's stand at MATELEC, the International Fair for Electric and Electronic materials, where ECI's Power Quality Initiative was highlighted. A stand at CONSTRUTECH promoted the ECPPC and Architecture campaigns. CEDIC was heavily in two ECI media events - "The Recycling Tour", on the destruction of the old national coins and in the Barcelona press conference on improving domestic electrical safety standards in Europe. Both events attracted significant press, TV and radio coverage.



### *Copper Development Association - United Kingdom*

At the Daily Mail Ideal Home Exhibition, CDA UK presented 1,600 visitors with a specific booklet on "Copper - Bringing Quality Home". This covered the broadest range of applications, from plumbing, through architecture, to electrical systems. The 2002 Copper in Architecture Awards attracted many high profile entries and generated extensive press coverage. Brass and copper/nickel training and awareness efforts have been continued. Technical support continued for ECI's LEONARDO Power Quality Programme and CDA UK gained prestigious approval, from the Institution of Electrical Engineers, as a provider of training seminars and learning resources. CDA UK managed the ECI Communications Committee's pilot programme on education. Copper facts to students, aged 12-16 years, have been included on an official schools website covering important areas of the UK National Curriculum.



# Accessing the Worldwide Network

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