

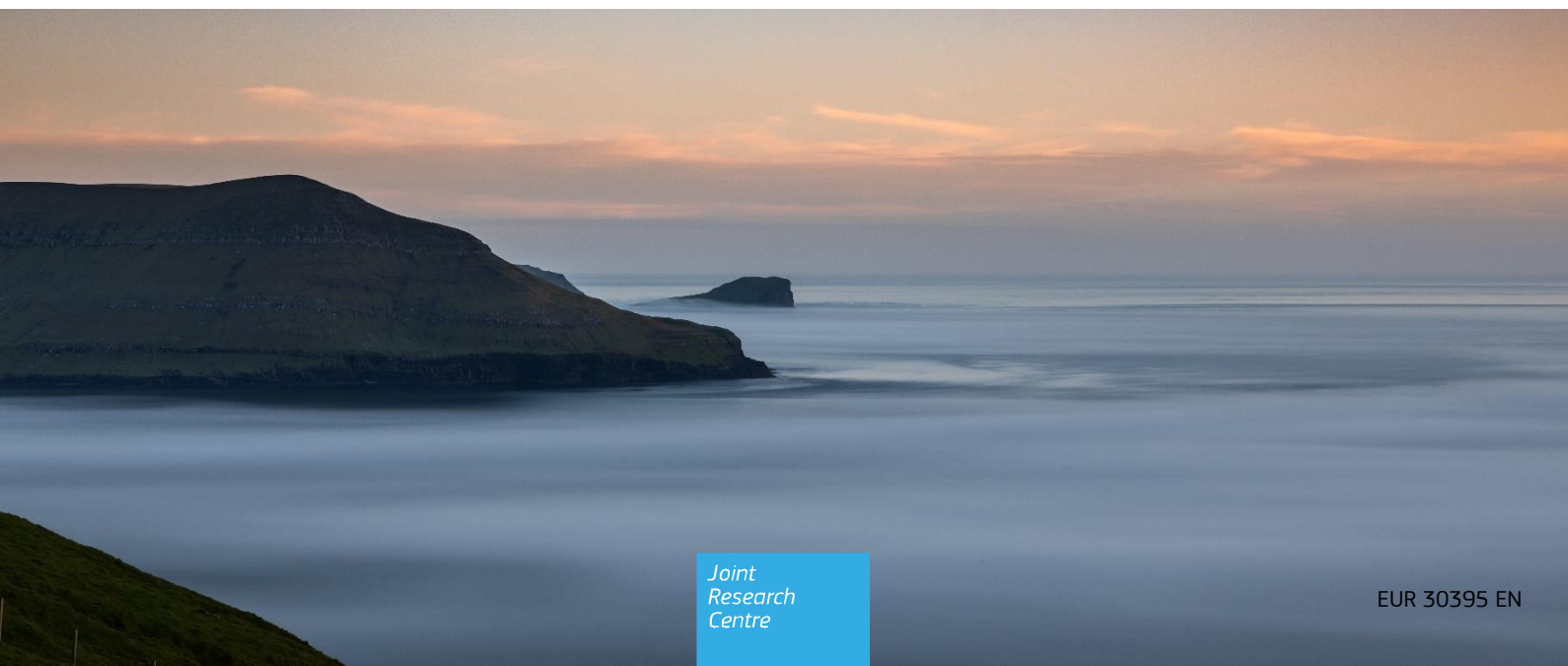
JRC TECHNICAL REPORT

EU Country profiles in the Raw Materials Information System (RMIS): Croatia

Country-level key data and information related to non-food, non-energy raw materials

Nita, V., Garbossa, E., Ciută, T., Bonollo, B., Mancini, L., Vidal, B., Latunussa, C., Wittmer, D., Hamor, T., d'Elia, E., Unguru, M. and Manfredi, S.

2020



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EU Science Hub

<https://ec.europa.eu/jrc>

JRC122067

EUR 30395 EN

PDF

ISBN 978-92-76-22976-6

ISSN 1831-9424

doi:10.2760/17

Luxembourg: Publications Office of the European Union, 2020

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How to cite this report: Nita, V., Garbossa, E., Ciuta, T., Bonollo, B., Mancini, L., Vidal, B., Latunussa, C., Wittmer, D., Hamor, T., d'Elia, E., Unguru, M. and Manfredi, S., *EU Country profiles in the Raw Materials Information System (RMIS): Croatia*, EUR 30395 EN, Publications Office of the European Union, Luxembourg, 2020, ISBN 978-92-76-22976-6, doi:10.2760/17, JRC122067.

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Foreword

The Raw Materials Information System (RMIS), developed and hosted by the Joint Research Centre (JRC), is the EC's reference knowledge platform on non-food, non-energy raw materials from primary to secondary sources. The RMIS includes a number of thematic sections, covering a broad range of topics relevant to raw materials policy. Among them, EU Country Profiles provide data and indicators for EU countries.

This report mirrors the content of the profile developed for Croatia, as available online in the RMIS.

Authors

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Abstract

The module European Country Profiles of the European Commission's Raw Materials Information System (RMIS) provides country-specific data and indicators related to non-food, non-energy raw materials. These data and indicators are derived from data from official sources and well-established data providers, or by their elaboration. Each profile is structured into nine thematic sections: i) Key indicators; ii) Investment and regulatory framework; iii) research, development and innovation; iv) Resources and reserves; v) Supply; vi) Raw materials use; vii) Trade; viii) Environment; and ix) Social & Policy.

The current country report presents the data and indicators for Croatia, mirroring the EU Country Profile for Croatia included in the RMIS in March 2020, which is the reference month of the data used.

1 Introduction

The module European Country Profiles ⁽¹⁾ of the European Commission's Raw Materials Information System (RMIS) aims to provide country-specific knowledge for non-food, non-energy raw materials. Seventeen EU countries profiles are currently accessible in the RMIS. For the remaining EU countries, work is ongoing.

These country profiles synthesize key data, information and indicators related to raw materials by either using data from established data providers (e.g., Eurostat, IMF, World Bank, UNIDO, UN Statistics) or by JRC elaboration based on the available official data (e.g., data on country's trade in raw materials at HS 6-digit level, country's exports of mining equipment, etc.).

Each profile is structured into nine thematic sections, as presented hereafter.

Key Indicators (section 1) and *Research, development and innovation* (section 3) include both selected economy-wide indicators (e.g., industrial competitiveness, contribution of mining sector to national economies, industry and manufacturing value added as share of GDP) and data on the economic performance of industrial sectors particularly relevant for raw materials - e.g. value added, employment, labour productivity, as well as magnitude of research and development expenditure.

Indicators of country-level and sectorial investments (e.g., share of total investment in GDP, foreign direct investments and exploration budget in metals and mining), as well the specificities of countries' mining legislative frameworks are presented in section 2, *Investment and regulatory framework*.

Data relating to country's estimated mineral resources and reserves are provided in section 4, *Resources and reserves*.

Supply section (section 5) presents data on country's volume of imported goods, domestic extraction by broad category of materials, production value of selected mining and manufacturing sectors, and country's production of non-food, non-energy minerals.

Section 6, *Raw material use*, focuses on utilization of raw materials, presenting data on country's volume of goods exported and domestic consumption by broad category of materials.

Section 7, *Trade*, presents country indicators and data on trade in non-food, non-energy raw materials, by relevant material category, product cluster, and Harmonized System chapter and subheading. Based on the methodology developed within the framework of Raw Materials Scoreboard ⁽²⁾, this section also presents the country's exports of mining equipment.

Environment section (section 8) includes tables and charts of selected indicators of environmental performance of relevant industrial sectors, such as emissions of greenhouse gases and particulate matter and generation of waste.

Several social and policy indicators are displayed in the section 9, *Social & Policy*, such as governance quality, policy perception, country risk and occupational safety.

The current country report presents data and indicators for Croatia, as elaborated in the *EU Country Profiles* module in the RMIS. This country profile was developed in March 2020, which is the reference month of all data (i.e., it includes the data available at that time).

Croatia's industry ranked 54th in the UNIDO's Competitive Industrial Performance Index in 2017. Industrial value added accounted for a fifth of Croatia's GDP in 2018.

Based on the share in the total manufacturing's value added, important raw material relevant manufacturing sectors are fabricated metal products and non-metallic mineral products. From the selected raw material

⁽¹⁾ <https://rmis.jrc.ec.europa.eu/?page=country-profiles#/>

⁽²⁾ For more methodological details and the list of 21 six-digit HS codes covered by this indicator, Raw materials scoreboard 2018, Methodological notes, Mining equipment exports, <https://op.europa.eu/en/publication-detail/-/publication/117c8d9b-e3d3-11e8-b690-01aa75ed71a1>

relevant sectors, manufacture of other non-metallic minerals and manufacture of wood and wood products contributed the most to the total value added and employment of the whole industry in 2017. The same two industrial sectors had highest production value in the same year.

Manufacture of other non-metallic mineral products had the highest level of business expenditure on R&D from the selected raw material relevant sectors in 2017.

Croatia is a net importer for all four HS broad product groups (food- and energy-related commodities included) - Raw Materials, Intermediate goods, Capital goods and Consumer goods - in 2017.

For the four raw material relevant HS product clusters selected, Croatia was a net exporter of Minerals and Wood, and net importer of Stone and Glass and Metals in 2017. Croatia had high trade surplus for two HS chapters, i.e., Wood and articles of wood (HS 44) and Salt; sulphur; earths and stone; plastering materials, lime and cement (HS 25).

As far as the environmental performance of the raw material relevant industrial sectors is concerned, mining and quarrying and manufacture of other non-metallic minerals have the highest greenhouse gas emission and PM 2.5 emission intensity in 2017.

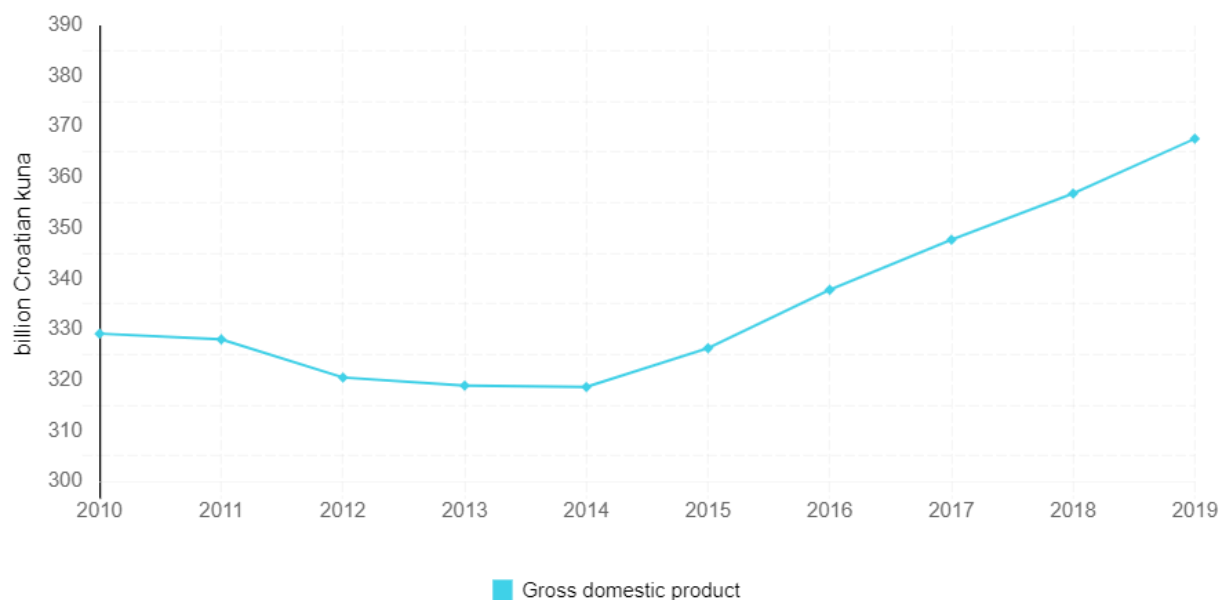
Croatia has medium-level scores for all six dimensions of governance, according to the Worldwide Governance Indicators, and has a low country risk, according to INFORM index.

2 Key indicators

2.1 Gross domestic product

Definition: GDP data are expenditure-based, in constant prices and billions of national currency units. Base year is country specific.

Figure 1. Gross domestic product (constant prices; 2010)⁽³⁾



2.2 Competitive Industrial Performance Index

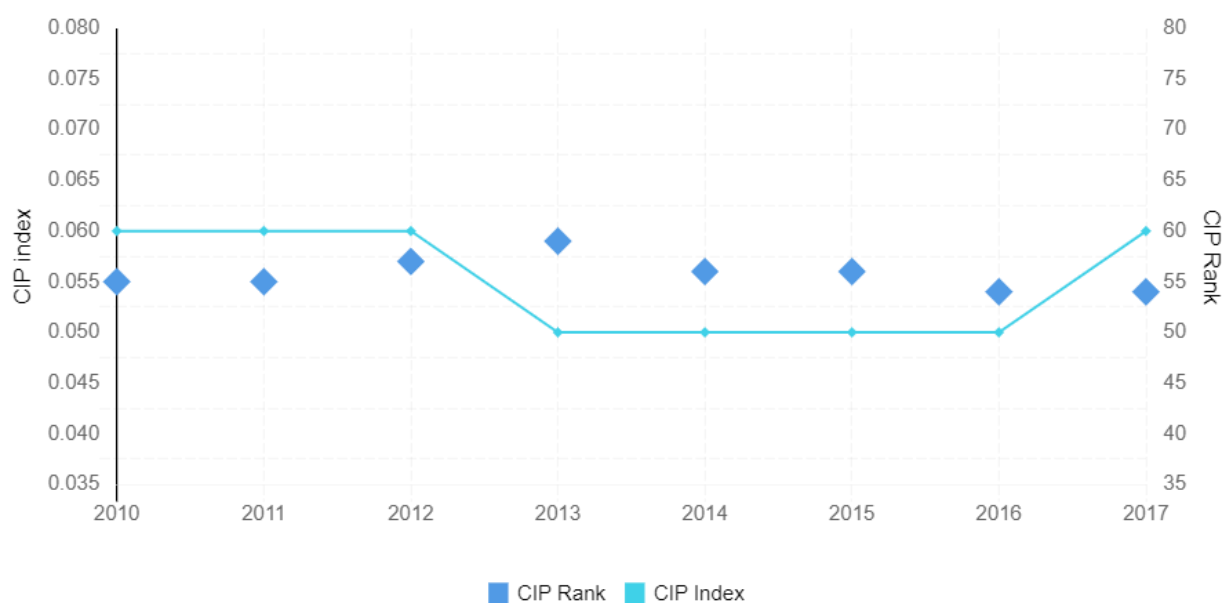
Definition: As calculated by UNIDO, Competitive Industrial Performance Index (CIP) aims at measuring the industrial performance of countries. CIP is a composite index based on eight indicators, grouped into three dimensions of industrial competitiveness: production and export capability; technology; and impact on global industrial production and trade.

The 2018 CIP report covers 150 economies ⁽⁴⁾.

⁽³⁾ IMF, World Economic Outlook Database, October 2019. <https://www.imf.org/external/pubs/ft/weo/2017/02/weodata/index.aspx>

⁽⁴⁾ UNIDO, Competitive Industrial Performance Report 2018, https://www.unido.org/sites/default/files/files/2019-05/CIP_Report_2019.pdf

Figure 2. Competitive Industrial Performance Index⁽⁵⁾



2.3 Mining Contribution Index

Definition: The Mining Contribution Index (MCI) quantifies the extent of mining sector's contribution to a country's economy. It is an index composed of four indicators, namely:

1. mineral and metal contribution to country's exports in 2016
2. change in export contribution of mining and metal exports over the period 2011-2016
3. mineral production value in 2016, expressed as a percentage of GDP
4. mineral rents as percentage of GDP.

Table 1. Mining Contribution Index 2018⁽⁶⁾

Mining Contribution Index 2018	2018 MCI Score: 23.8	Rank: 155 (out of 182)
---------------------------------------	-----------------------------	-------------------------------

2.4 Industry's and manufacturing's value added as share of GDP

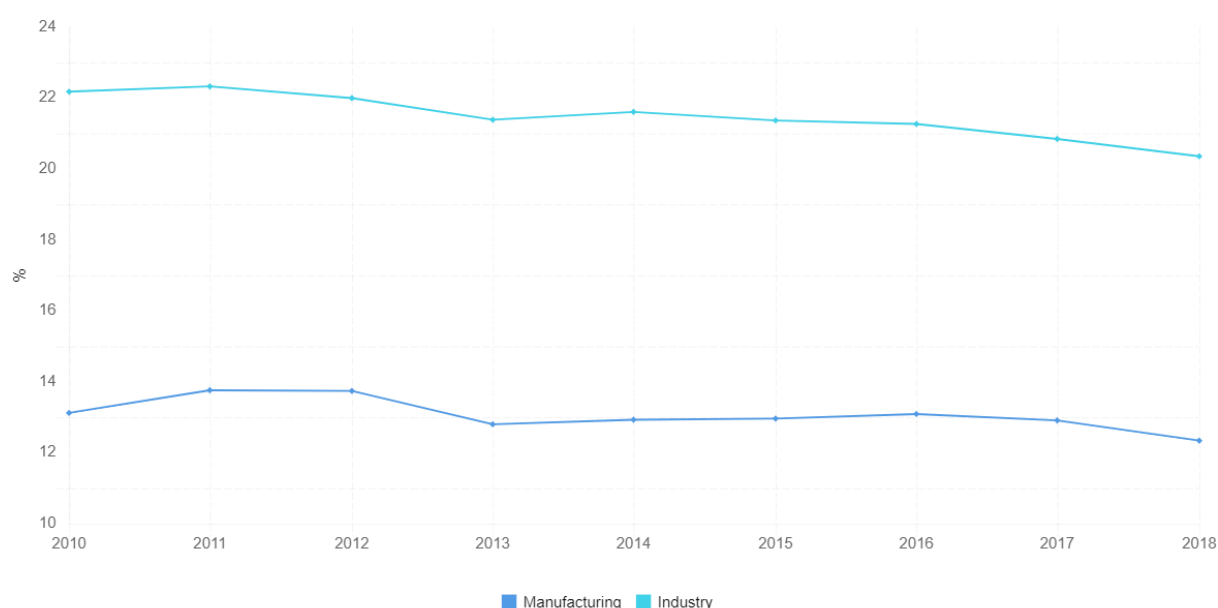
Definition: Value added is the net output of a sector after adding up all outputs and subtracting intermediate inputs. Industry covers the International Standard Industrial Classification (ISIC) divisions 10-45. As defined by World bank, industry's value added comprises value added in mining, manufacturing, construction, electricity, water, and gas. Value added is calculated without making deductions for depreciation of fabricated assets or depletion and degradation of natural resources.

Manufacturing covers ISIC divisions 15-37.

⁽⁵⁾ UNIDO, Competitive Industrial Performance Index, CIP 2019 database.

⁽⁶⁾ Source of data (and details on MCI calculation): International Council on Mining and Metals, Role of mining in national economies. Mining Contribution Index 2018 4th edition, <https://www.icmm.com/en-gb/society-and-the-economy/role-of-mining-in-national-economies/mining-contribution-index>

Figure 3. Industry's and manufacturing's value added as share of GDP ⁽⁷⁾



2.5 Main five manufacturing sectors

This indicator presents the country's leading five manufacturing sectors, based on their share in the total value added of manufacturing sector.

Table 2. Main five manufacturing sectors (share of value added; 2017)⁽⁸⁾

Rank	Manufacturing sector (ISIC Rev. 3.0, 2 digits)	Share (%)
1	Food and beverages	21.16
2	Fabricated metal products	12.67
3	Machinery and equipment n.e.c.	9.17
4	Chemicals and chemical products	7.94
5	Non-metallic mineral products	6.07

2.6 Value added of selected industrial sectors

Definition: As calculated by Eurostat, "Value added at factor costs is the gross income from operating activities after adjusting for operating subsidies and indirect taxes; value adjustments (such as depreciation) are not subtracted" ⁽⁹⁾.

The figure includes data for the following NACE Rev.2 sectors relevant for industrial raw materials:

1. B07 Mining of metal ores
2. B08 Other mining and quarrying
3. B09.9 Support activities for other mining and quarrying
4. C16 Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials
5. C17 Manufacture of paper and paper products
6. C22.1 Manufacture of rubber products

⁽⁷⁾ World Bank, World Development Indicators. <https://data.worldbank.org/products/wdi>

⁽⁸⁾ UNIDO, Country profile, http://stat.unido.org/?_ga=2.94848220.1164807116.1524737768-1906126199.1524492512

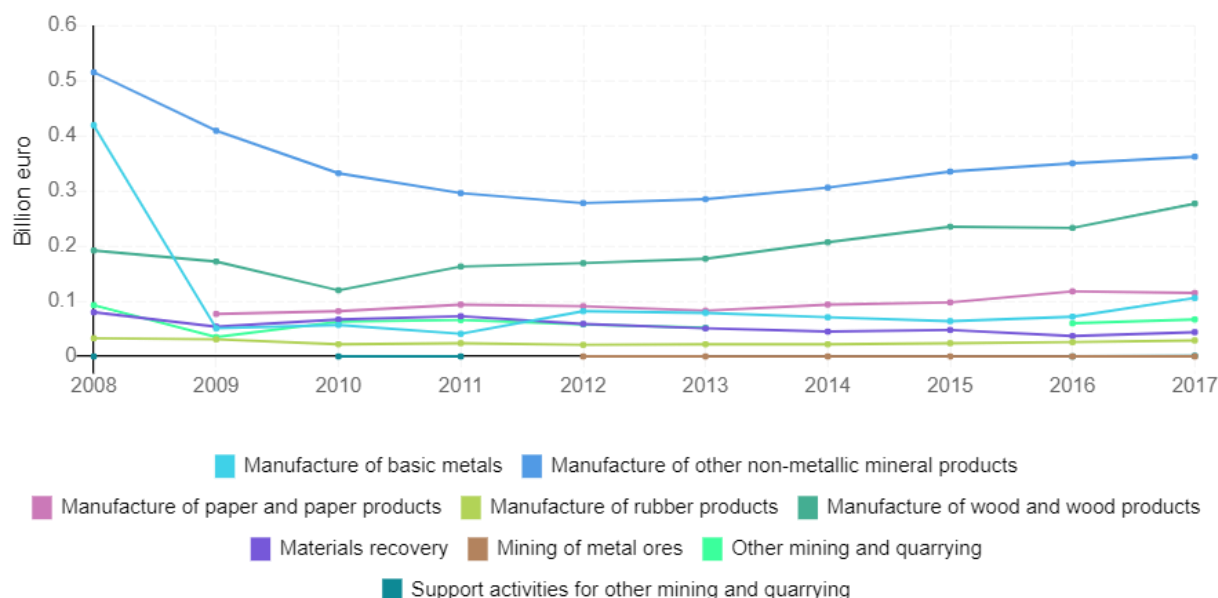
⁽⁹⁾ Eurostat, metadata of Structural Business Statistics, https://ec.europa.eu/eurostat/cache/metadata/en/sbs_esms.htm

7. C23 Manufacture of other non-metallic mineral products
8. C24 Manufacture of basic metals
9. E38.3 Materials recovery

As complete time series for value added were not available, the forestry-related sectors are not covered.

The contribution (percentage) of each sector to the total value added of industry (NACE sections B-E) is also presented in the figure.

Figure 4. Value added of selected industrial sectors⁽¹⁰⁾ ⁽¹¹⁾



2.7 Number of employees in selected industrial sectors

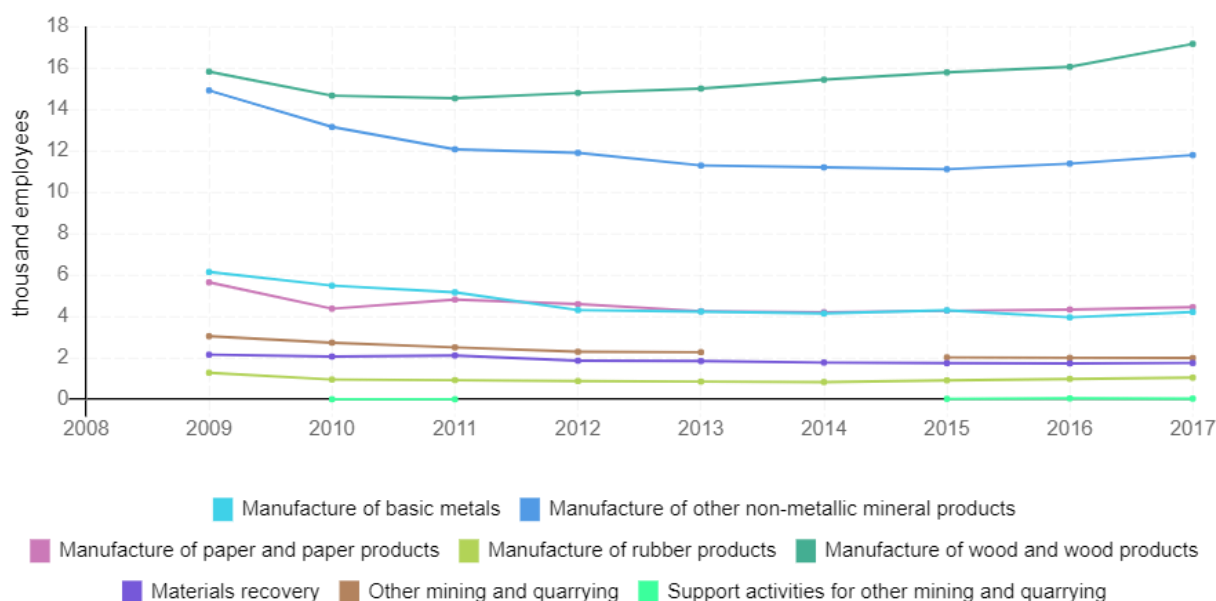
Definition: One of the indicators used for monitoring employment sectors is the Number of employees. This variable is defined by Eurostat as those persons who work for an employer and who have a contract of employment and receive compensation in the form of wages, salaries, fees, gratuities, piecework pay or remuneration in kind. A worker from an employment agency is considered to be an employee of that temporary employment agency and not of the unit (customer) in which they work.

The NACE Rev.2 sections used to collect data and calculate the sectoral percentage of employees in the total industry sectors are the following: B, Mining and quarrying; C: Manufacturing; D: Electricity, gas, steam and air conditioning supply; E: Water supply; sewerage, waste management and remediation activities.

⁽¹⁰⁾ Value added at factor cost in raw materials sectors over time. It also shows the contribution of these activities to the value added of the whole industrial sector (including: mining and quarrying; manufacturing; electricity, gas, steam and air conditioning supply; water supply, sewerage, waste management and remediation activities).

⁽¹¹⁾ Eurostat, Structural Business Statistics, Annual detailed enterprise statistics for industry (NACE Rev. 2, B-E), dataset code: sbs_na_ind_r2, Value added at factor cost. http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=sbs_na_ind_r2&lang=en

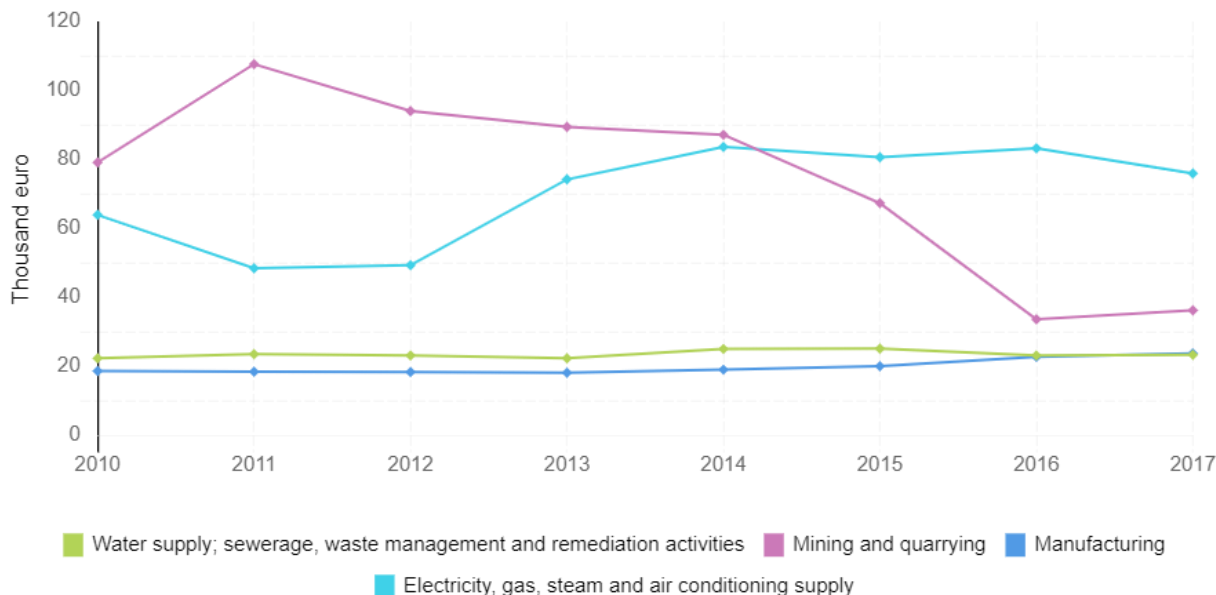
Figure 5. Number of employees in selected industrial sectors ⁽¹²⁾ ⁽¹³⁾



2.8 Labour productivity of industry

This indicator presents the labour productivity of the four NACE Rev.2 sections of industry (B, Mining and quarrying; C, Manufacturing; D, Electricity, gas, steam and air conditioning supply; E, Water supply; sewerage, waste management and remediation activities), calculated by Eurostat as gross value added per employee.

Figure 6. Labour productivity of industry (NACE Rev.2, sections B-E) ⁽¹⁴⁾



⁽¹²⁾ Number of employees in the raw materials sectors over time. It also shows the contribution of these activities to the total number of jobs in the industrial sector (including: mining and quarrying; manufacturing; electricity, gas, steam and air conditioning supply; water supply, sewerage, waste management and remediation activities).

⁽¹³⁾ Eurostat, Structural business statistics (sbs), Annual detailed enterprise statistics for industry (NACE Rev. 2, B-E), dataset code: sbs_na_ind_r2, Employees - number. http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=sbs_na_ind_r2&lang=en

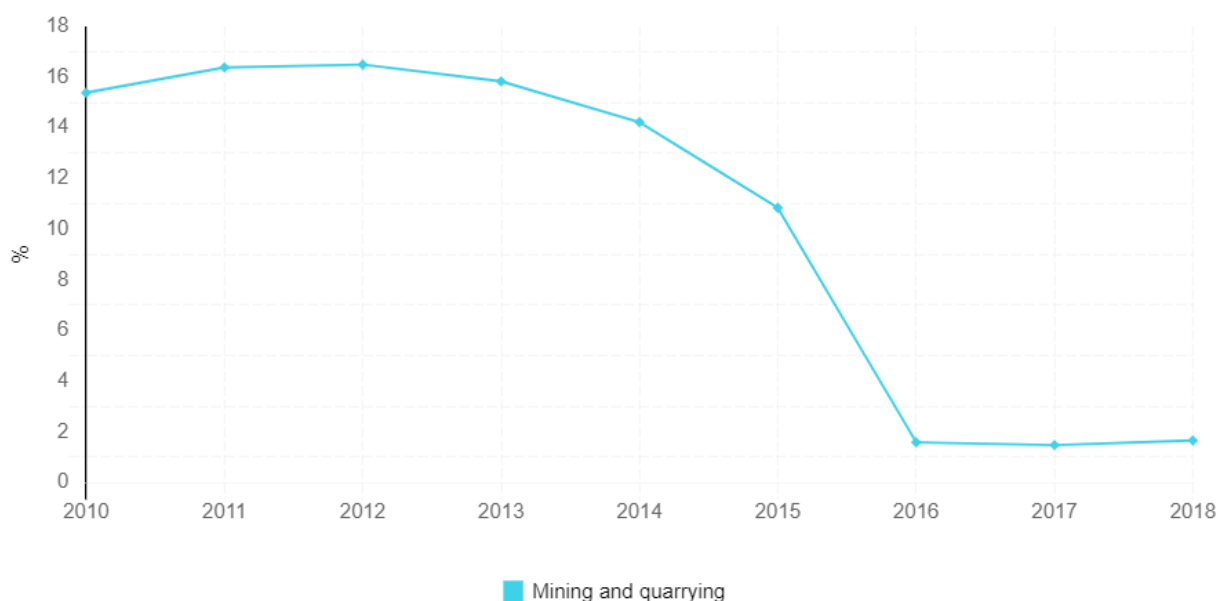
⁽¹⁴⁾ Eurostat, Structural business statistics (sbs), Annual detailed enterprise statistics for industry (NACE Rev. 2, B-E), dataset code: sbs_na_ind_r2, Gross value added per employee

2.9 Production value of mining and quarrying as share in total industry

Definition: Production value measures “the amount produced based on sales and including changes in stocks and the resale of goods and services. It is calculated by Eurostat as turnover plus/minus the changes in stocks of finished products, work in progress and goods and services purchased for resale, minus the purchases of goods and services for resale, plus capitalized production, plus other operating income (excluding subsidies). Income and expenditure classified as financial or extraordinary in company accounts is excluded from production value”⁽¹⁵⁾.

Data provided in the chart for Mining and quarrying sector are calculated as share of total industry (i.e., sections B-E, NACE Rev.2).

Figure 7. Production value of mining and quarrying as share in total industry
(sections B-E, NACE Rev.2)⁽¹⁶⁾



⁽¹⁵⁾ Eurostat, Structural Business Statistics, Reference Metadata, http://ec.europa.eu/eurostat/cache/metadata/en/sbs_esms.htm

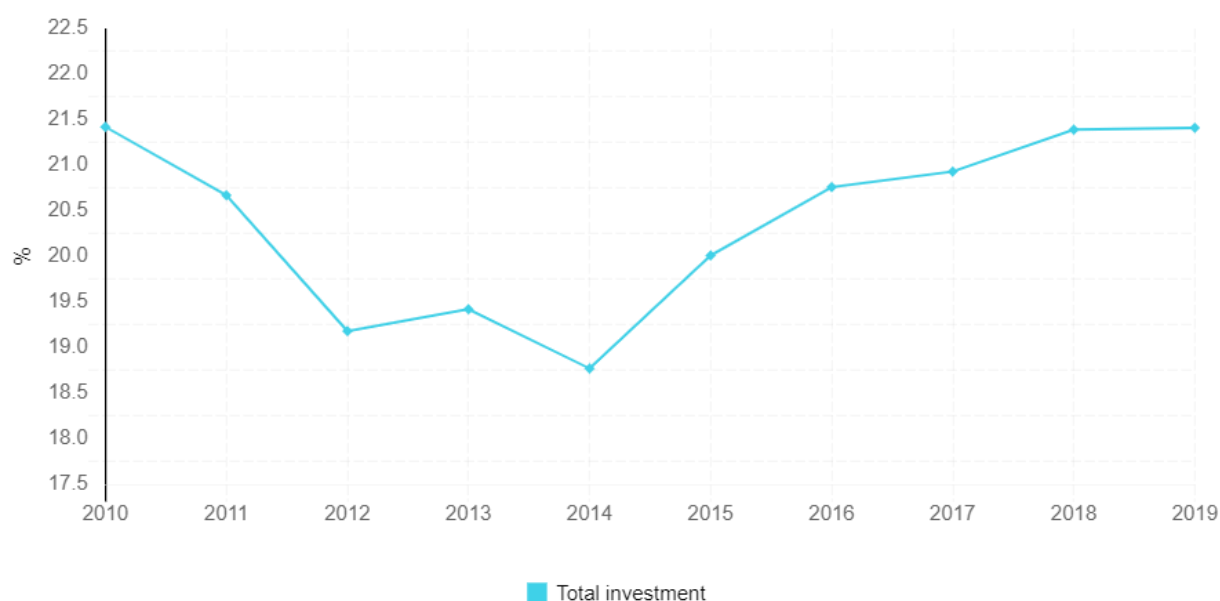
⁽¹⁶⁾ Eurostat, Structural business statistics (sbs), Annual detailed enterprise statistics for industry (NACE Rev. 2, B-E), dataset code: sbs_na_ind_r2, Production value http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=sbs_na_ind_r2&lang=en

3 Investments and regulatory framework

3.1 Total investment as percentage of GDP

This indicator is calculated by the International Monetary Fund as a “ratio of total investment (in current local currency) and GDP (in current local currency). Investment or gross capital formation is measured by the total value of the gross fixed capital formation and changes in inventories and acquisitions less disposals of valuables”⁽¹⁷⁾

Figure 8. Total investment as percentage of GDP⁽¹⁸⁾



3.2 Foreign direct investments: flows and stocks

As defined by UNCTAD in the Methodological Note accompanying the World Investment Report 2017⁽¹⁹⁾:

1. “flows of FDI comprise capital provided (either directly or through other related enterprises) by a foreign direct investor to an FDI enterprise, or capital received from an FDI enterprise by a foreign direct investor”,
2. “FDI stock is the value of the share of their capital and reserves (including retained profits) attributable to the parent enterprise, plus the net indebtedness of affiliates to the parent enterprise”.

⁽¹⁷⁾ IMF, World Economic Outlook Database, April 2019, <https://www.imf.org/external/pubs/ft/weo/2018/02/weodata/index.aspx>

⁽¹⁸⁾ IMF, World Economic Outlook Database, April 2019, <https://www.imf.org/external/pubs/ft/weo/2018/02/weodata/index.aspx>

⁽¹⁹⁾ http://unctad.org/en/PublicationChapters/wir2017chMethodNote_en.pdf

Figure 9. Inward flows and stocks ⁽²⁰⁾

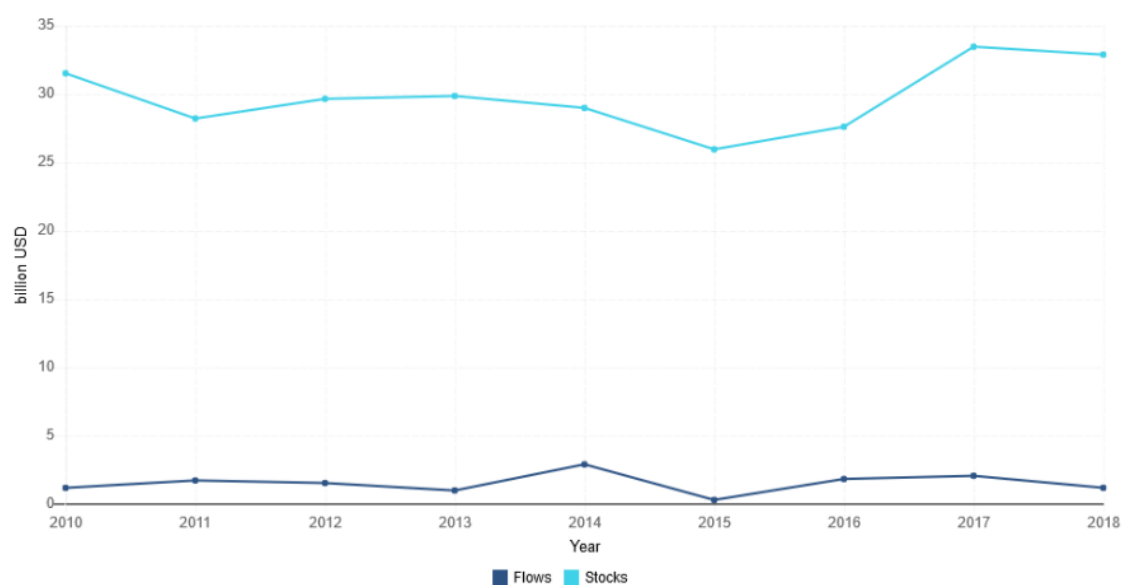
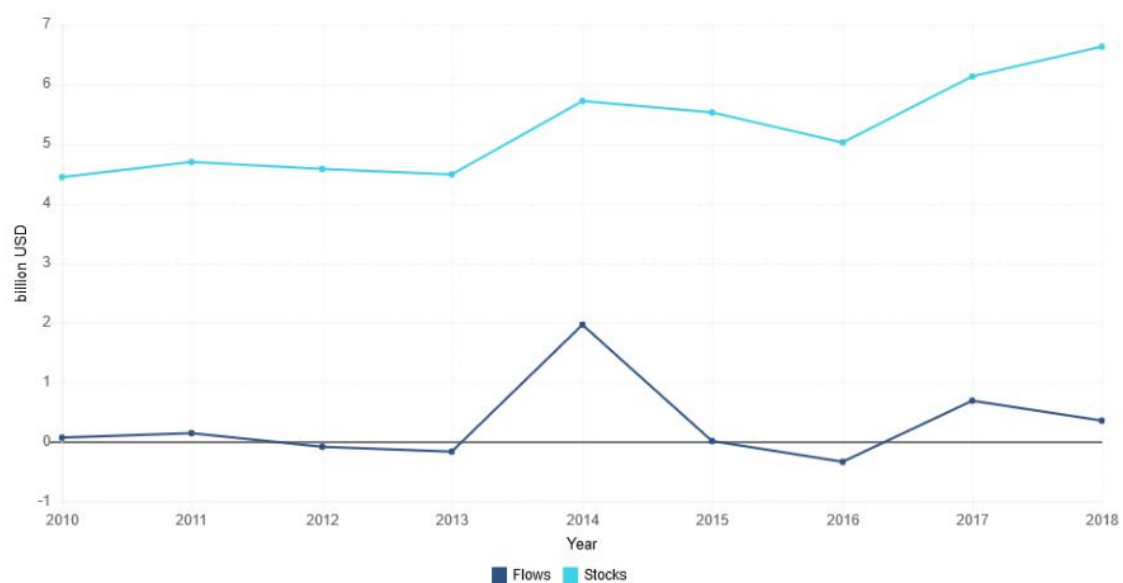


Figure 10. Outward flows and stocks ⁽²¹⁾



⁽²⁰⁾ UNCTAD, Statistics Data Center, Foreign
http://unctadstat.unctad.org/wds/ReportFolders/reportFolders.aspx?sCS_ChosenLang=en

⁽²¹⁾ UNCTAD, Statistics Data Center, Foreign
http://unctadstat.unctad.org/wds/ReportFolders/reportFolders.aspx?sCS_ChosenLang=en

3.3 Flows and stocks of foreign direct investment in mining and quarrying sector

Table 3. Flows and stocks of foreign direct investment in mining and quarrying sector (million USD)⁽²²⁾

Mining and quarrying	2013	2014	2015	2016	2017
Inward flows	-16.3	3.4	-26.4	-32.7	16.8
Inward stocks	226.1	263.6	185	156.1	190.4
Outward flows	-66.5	-12.2	-205	-55.8	-33.9
Outward stocks	265.8	159.2	-52.9	-102.5	-107.4

3.4 Annual exploration budget in metals and mining

S&P Global Market Intelligence, based on the data reported by companies and its own estimates, is the data provider. The nonferrous exploration budgets covered by S&P Global Market Intelligence include spending for gold, base metals, platinum group metals, diamonds, U3O8, silver, rare earths, potash/phosphate, and many other hard-rock metals, but exclude exploration budgets for iron ore, coal, aluminum, oil and gas, and many industrial minerals (S&P Global Market Intelligence).

Data not available⁽²³⁾

3.5 Business environment

Doing Business 2019 aims at measuring business regulation in 190 economies by examining five dimensions.

1. Starting a business,
2. Getting a location;
3. Accessing finance;
4. Dealing with day-to-day operations;
5. Operating in a secure business environment.

It contains 11 indicator sets: Starting a business; Labor market regulation; Dealing with construction permits; Getting electricity; Registering property; Getting credit; Protecting minority investors; Trading across borders; Paying taxes; Enforcing contracts; and Resolving insolvency (according to Doing Business 2019. Reforming to Create Jobs⁽²⁴⁾).

Table 4. Business environment⁽²⁵⁾

Ease of doing Business index 2020	Rank: 51 (out of 190)
--	-----------------------

⁽²²⁾ International Trade Center, Investment Map, <https://www.investmentmap.org/>

⁽²³⁾ S&P Global Market Intelligence, Country profile, Exploration Budget Trends

⁽²⁴⁾ <http://www.doingbusiness.org/reports/global-reports/doing-business-2019>

⁽²⁵⁾ World Bank, Doing Business. Measuring Business Regulations, <http://www.doingbusiness.org/>

3.6 Regulatory framework

The regulatory framework review is focusing on minerals ownership, major governing laws, permitting rules and competent authorities. This extract is based on the MINLEX report published by DG GROW.⁽²⁶⁾

Legislation, ownership, and categories of minerals

In Croatia, all mineral resources are state-owned. Mining in Croatia is governed by the Mining Act, the Geological Explorations Act, the Concessions Act, and the Regulation on compensation for concession for exploitation of mineral resources.

Regulatory framework and permitting

Croatia has a centralised permitting regime and the co-authorities involved include the Ministry of Economy (issues permits/licenses for exploration and extraction), the M. of Environmental and Nature Protection, the M. of Construction and Physical Planning, the M. of Finance (provides financial and legal documents necessary to start the procedure for granting a concession) and the M. of Agriculture. The decision to grant an exploration permit for concession can only be provided in areas planned for mining activities. The beneficiary must obtain from the landowner a written permission. Concerning extraction permits, a concession shall be performed on the basis of public tender in a procedure consisting of four phases. The criteria for selecting the best bidder are laid down in the Concessions Act. Extraction fields shall not be approved for a period longer than 40 years.⁽²⁷⁾

⁽²⁶⁾ DG GROW- MINPOL 2017: Legal framework for mineral extraction and permitting procedures for exploration and exploitation in the EU - ISBN 978-92-79-53905-3; doi:10.2873/920344

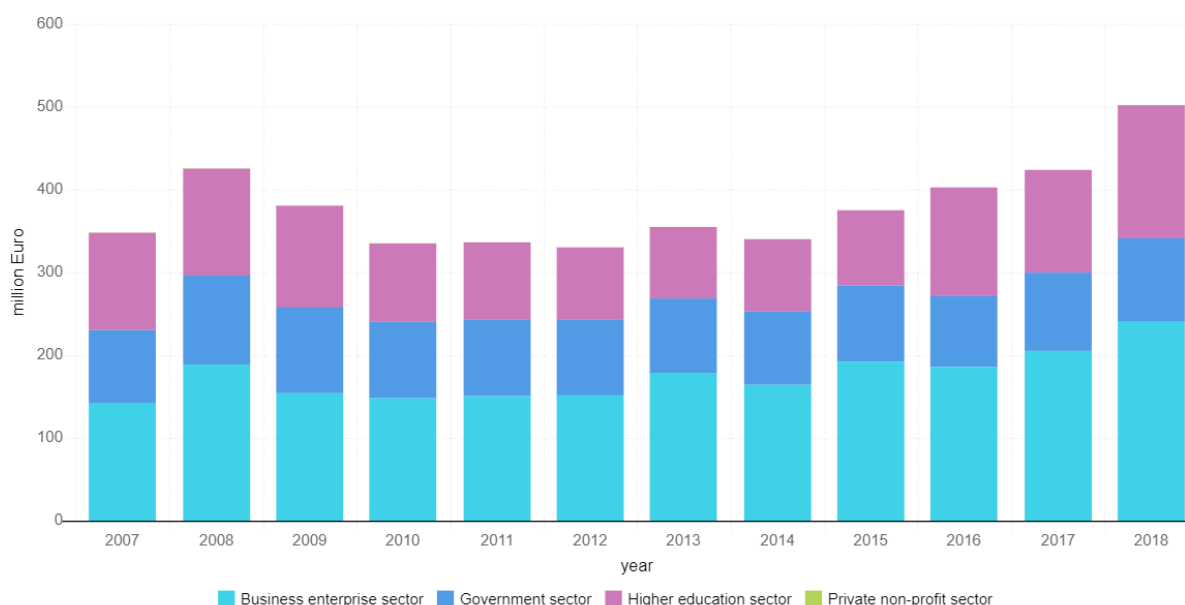
⁽²⁷⁾ DG GROW, Legal framework for mineral extraction and permitting procedures for exploration and exploitation in the EU, final report of MINLEX project, 2017. More detailed information on the legal and regulatory framework can be found at the Policy&Legislation/Member States Legislation section.

4 Research, development, and innovation

4.1 Gross domestic expenditure on R&D

Definition: Gross domestic expenditure on R&D (GERD) includes expenditure on research and development by business enterprises (BERD), higher education institutions, as well as government and private non-profit organizations. For additional methodological details, see Eurostat, Statistics on research and development (rd)⁽²⁸⁾.

Figure 11. Gross domestic expenditure on R&D ⁽²⁹⁾



4.2 Business expenditure on R&D by relevant NACE Rev. 2 sector

Definition: Expenditure on R&D in the business enterprise sector (BERD) includes all business R&D carried out on national territory. ⁽³⁰⁾

The figure includes data for the following NACE Rev.2 sectors:

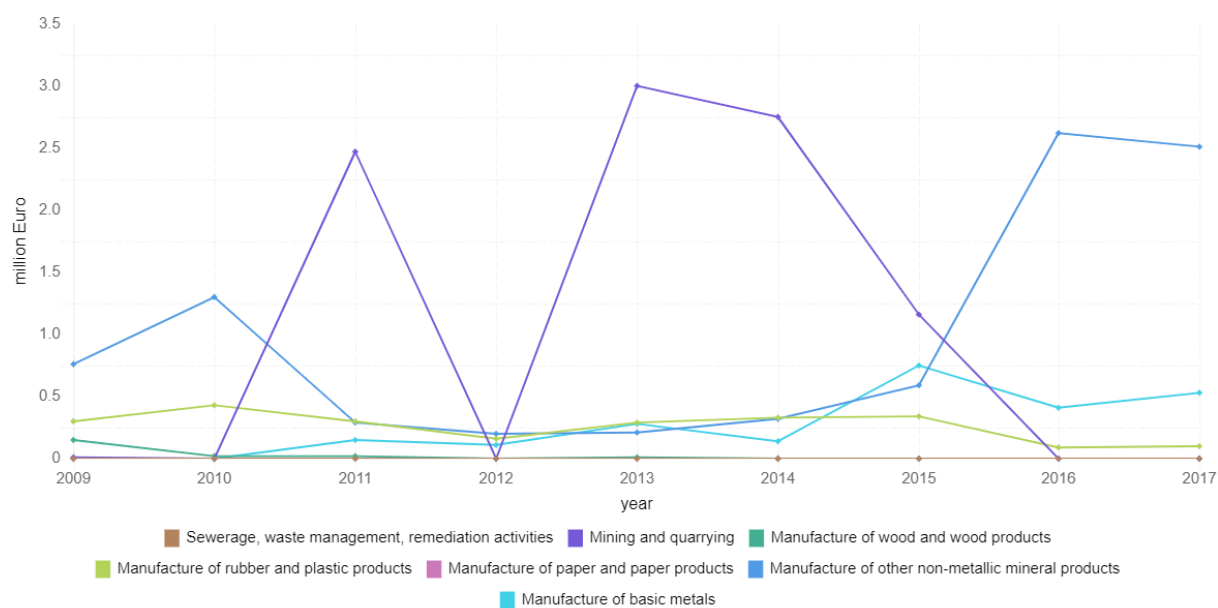
1. Mining and quarrying (B);
2. Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials (C16);
3. Manufacture of paper and paper products (C17);
4. Manufacture of rubber and plastic products (C22);
5. Manufacture of other non-metallic mineral products (C23);
6. Manufacture of basic metals (C24);
7. Sewerage, waste management, remediation activities (incl. materials recovery) (E37-E39).

⁽²⁸⁾ http://ec.europa.eu/eurostat/cache/metadata/en/rd_esms.htm

⁽²⁹⁾ Eurostat, Gross domestic expenditure on R&D (GERD) by sectors of performance, dataset code: rd_e_gerdtot, http://ec.europa.eu/eurostat/product?code=rd_e_gerdtot&language=en&mode=view

⁽³⁰⁾ DG EUROSTAT (2000): Structural business statistics. EU economy in the Triad with contrasted results. In: Statistics in focus, Theme 4, 23/2000

Figure 12. Business expenditure on R&D by relevant NACE Rev. 2 sector⁽³¹⁾



⁽³¹⁾ Eurostat, Business expenditure on R&D (BERD) by NACE Rev. 2 activity, dataset code: rd_e_berdindr2, http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=rd_e_berdindr2&lang=en

5 Resources and reserves

5.1 Estimated resources

Definition: The term is synonymously used for “mineral resource”, “inferred mineral resource”, “indicated mineral resource” and “measured mineral resource”. In this case, confidence in the existence of a resource is indicated by the geological knowledge and preliminary data, while at the same time the extraction would be legally, economically, and technically feasible.

No public data available for this section.

5.2 Estimated reserves

Definition: The term is synonymously used for “mineral reserve”, “probable mineral reserve” and “proven mineral reserve”. In this case, confidence in the reserve is measured by the geological knowledge and data, while at the same time the extraction would be legally, economically, and technically feasible. The authority responsible for collecting reserve data for Croatia is the Mining Directorate, Ministry of Economy. The data is collected annually from company submission. The figures include marine/offshore mineral deposit and do not include any data from overseas territories.

The Ministry of Economy – Directorate for Mining, provided a summary report on exploitable reserves (A+B+C1) and production data for the period from 1997 to 2013⁽³²⁾

The National reporting code for Croatia is a modification of the Russian code where reserves are termed as “exploitable reserves” which consist of A, B, and C1 reserves, C2 and D1 reserves are considered as “potential reserves” the sum of these data are considered resources ⁽³³⁾.

Table 5. Estimated reserves⁽³⁴⁾

Commodity	Sub-Commodity	Reporting code	Quantity	Unit
Aggregates and related materials	Chalk	National reporting code	1030.02	Thousand tonnes
Aggregates and related materials	Crushed rock	National reporting code	641907.94	Thousand cubic metres
Aggregates and related materials	Limestone for lime	National reporting code	258641.77	Thousand tonnes
Aggregates and related materials	Limestone, ornamental	National reporting code	29179.38	Thousand cubic metres
Aggregates and related materials	Sand and gravel	National reporting code	158743.09	Thousand cubic metres
Barytes		National reporting code	185.9	Thousand tonnes
Bauxite		National reporting code	1243.99	Thousand tonnes
Bentonite		National reporting code	686.86	Thousand tonnes
Clay	Clay	National reporting code	43061.72	Thousand cubic metres
Clay	Clays for cement works	National reporting code	417240.57	Thousand tonnes

⁽³²⁾ Available at: http://www.mingo.hr/public/rudarstvo/Ukupne_rezerve_min_sirovina_97_13.pdf

⁽³³⁾ The details regarding reporting code is available in Croatian at: http://narodne-novine.nn.hr/clanci/sluzbeni/1992_08_48_1248.html.

⁽³⁴⁾ Minerals4EU, accessible at <http://minerals4eu.brgm-rec.fr/m4eu-yearbook/>

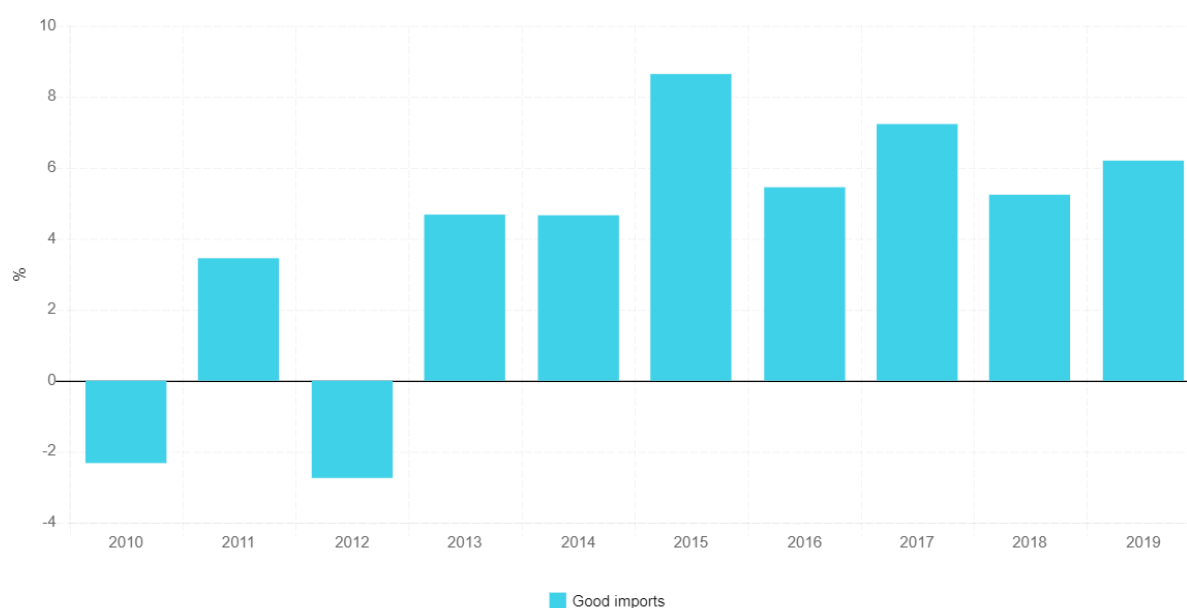
Commodity	Sub-Commodity	Reporting code	Quantity	Unit
Clay	White-firing clays (refractory & ceramic)	National reporting code	2871.01	Thousand tonnes
Gypsum	Gypsum	National reporting code	51229.28	Thousand tonnes
Mercury	Mercury	National reporting code	3.82	Thousand tonnes
Silica	Silica sands	National reporting code	33035.77	Thousand tonnes

6 Supply

6.1 Annual percentage change of the volume of imports of goods

As defined in the methodology of IMF's World Economic Outlook, October 2018, Annual change of imports of goods refers to the aggregate change in the quantity of imports of goods. This indicator measures the percentage change in the volume estimates of imports of goods from the base year, which is country specific⁽³⁵⁾. According to the OECD's definition, trade in goods includes "all goods which add to, or subtract from, the stock of material resources of a country by entering its economic territory (imports) or leaving it (exports)"⁽³⁶⁾. The goods commodity group aggregates commodity classes referring to the subheadings of the Harmonized System.

Figure 13. Annual percentage change of the volume of imports of goods (base year = 2005)⁽³⁷⁾



6.2 Domestic extraction by main category (million tonnes)

Definition: Domestic extraction indicates the total amount of material extracted by resident units from the natural environment for further processing in the economy; the visualizations include three material categories (metals ores, non-metallic minerals, and woods).

Table 6. Domestic extraction by main category (million tonnes)⁽³⁸⁾

Material category	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Metal ores (gross ores)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Non-metallic minerals	42.2	34.0	24.4	25.5	22.9	24.0	21.5	24.3	23.0	23.7	24.2
Wood	2.9	2.8	2.9	3.5	3.7	3.5	3.3	3.4	3.4	3.5	3.5

⁽³⁵⁾ According to Export and Import Price Index Manual: Theory and Practice, Glossary; also <http://www.imf.org/external/pubs/ft/weo/2013/01/weodata/index.aspx>

⁽³⁶⁾ <https://data.oecd.org/trade/trade-in-goods.htm#indicator-chart>

⁽³⁷⁾ IMF, World Economic Outlook Database, April 2019, <https://www.imf.org/external/pubs/ft/weo/2018/02/weodata/index.aspx>

⁽³⁸⁾ Eurostat, Material flow accounts statistics, 20. March 2018, http://ec.europa.eu/eurostat/product?code=env_ac_mfa&language=en&mode=view

6.3 Production of relevant industrial sectors

This section presents the gross output of raw materials related sectors in monetary terms (million Euro), referring to year 2018.

Sectoral data are taken from Eurostat, Structural Business Statistics. According to Eurostat's methodology, Production value is an output-related variable that *“measures the amount produced based on sales and including changes in stocks and the resale of goods and services. Production value is calculated by Eurostat as turnover plus/minus the changes in stocks of finished products, work in progress and goods and services purchased for resale, minus the purchases of goods and services for resale, plus capitalized production, plus other operating income (excluding subsidies)”*⁽³⁹⁾.

Table 7. Production of relevant industrial sectors (million Euro; 2018) ⁽⁴⁰⁾ ⁽⁴¹⁾

Sector	Production
Mining of metal ores (B07, NACE Rev.2)	0.0
Other mining and quarrying (B08, NACE Rev.2)	206.1
Mining support service activities (B09, NACE Rev.2)	201.9
Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials (C16, NACE Rev.2)	1,027.0
Manufacture of other non-metallic mineral products (C23, NACE Rev.2)	1,144.0
Manufacture of basic metals (C24, NACE Rev.2)	388,9

6.4 Production of primary minerals

Definition: Mineral Raw Materials are defined as mineral constituents of the earth's crust, which are of economic value, including output from mines as well as the output from processing at or near the mines. The production data reported by WMD indicate the content of recoverable valuable elements and compounds.

Table 8. Production of primary minerals in 2017⁽⁴²⁾

Commodity	Quantity	Unit	% of world production
Bauxite	12215	Tonnes	0.004
Gypsum	147934	Tonnes	0.10
Salt	19006	Tonnes	0.01

⁽³⁹⁾ Eurostat, Structural Business Statistics, Reference Metadata, http://ec.europa.eu/eurostat/cache/metadata/en/sbs_esms.htm

⁽⁴⁰⁾ This section presents the gross output of raw-materials related sectors in monetary terms (million Euro), referring to year 2018.

⁽⁴¹⁾ Eurostat, Structural business statistics (sbs), Annual detailed enterprise statistics for industry (NACE Rev. 2, B-E), dataset code: sbs_na_ind_r2, Production value http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=sbs_na_ind_r2&lang=en

⁽⁴²⁾ The mineral raw materials production refers to the data provided by The World Mining Data 2019 (WMD), accessible at <http://www.wmc.org.pl/?q=node/49>.

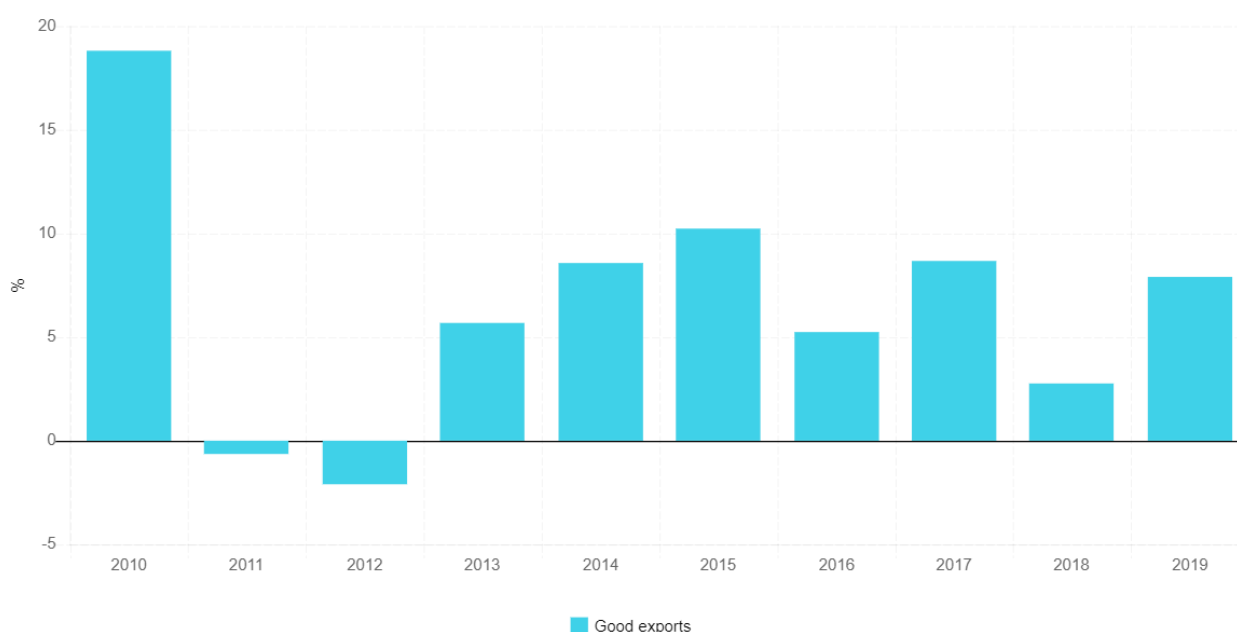
The Data related to mineral raw materials were obtained by WMD through evaluation of questionnaires sent to the National Committees of member countries of the World Mining Congress as well as to other bodies such as Embassies, Foreign Trade Representatives etc. In addition, WMD have also used, when available, official mining statistics such as BGS and USGS.

7 Raw material use

7.1 Annual percentage change of the volume of exports of goods

As defined in the methodology of IMF's World Economic Outlook, October 2017, Annual change of exports of goods refers to the aggregate change in the quantity of imports of goods. This indicator measures the percentage change in the volume estimates of exports of goods from the base year, which is country specific⁽⁴³⁾. According to the OECD's definition, trade in goods includes "all goods which add to, or subtract from, the stock of material resources of a country by entering its economic territory (imports) or leaving it (exports)".⁽⁴⁴⁾ The goods commodity group aggregates commodity classes referring to the subheadings of the Harmonized System.

Figure 14. Annual percentage change of the volume of exports of goods (base year = 2005) ⁽⁴⁵⁾



7.2 Domestic material consumption by main category

Definition: Domestic material consumption (DMC), measures the total amount of materials directly used by an economy and is defined as the annual quantity of raw materials extracted from the domestic territory, plus all physical imports minus all physical exports.

Table 9. Domestic material consumption by main category (million tonnes) ⁽⁴⁶⁾

Category	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Metal ores (gross ores)	1.2	0.7	0.5	0.3	0.3	0.4	0.5	0.6	0.8	0.6	0.7
Non-metallic minerals	42.2	31.3	23.2	24.0	22.8	22.4	19.1	22.7	21.3	22.2	22.6
Wood	1.8	1.5	1.3	1.6	1.8	1.2	0.6	0.8	0.8	0.9	1.4

⁽⁴³⁾ According to Export and Import Price Index Manual: Theory and Practice, Glossary; also <http://www.imf.org/external/pubs/ft/weo/2013/01/weodata/index.aspx>

⁽⁴⁴⁾ <https://data.oecd.org/trade/trade-in-goods.htm#indicator-chart>

⁽⁴⁵⁾ IMF, World Economic Outlook Database, April 2019, <https://www.imf.org/external/pubs/ft/weo/2018/02/weodata/index.aspx>

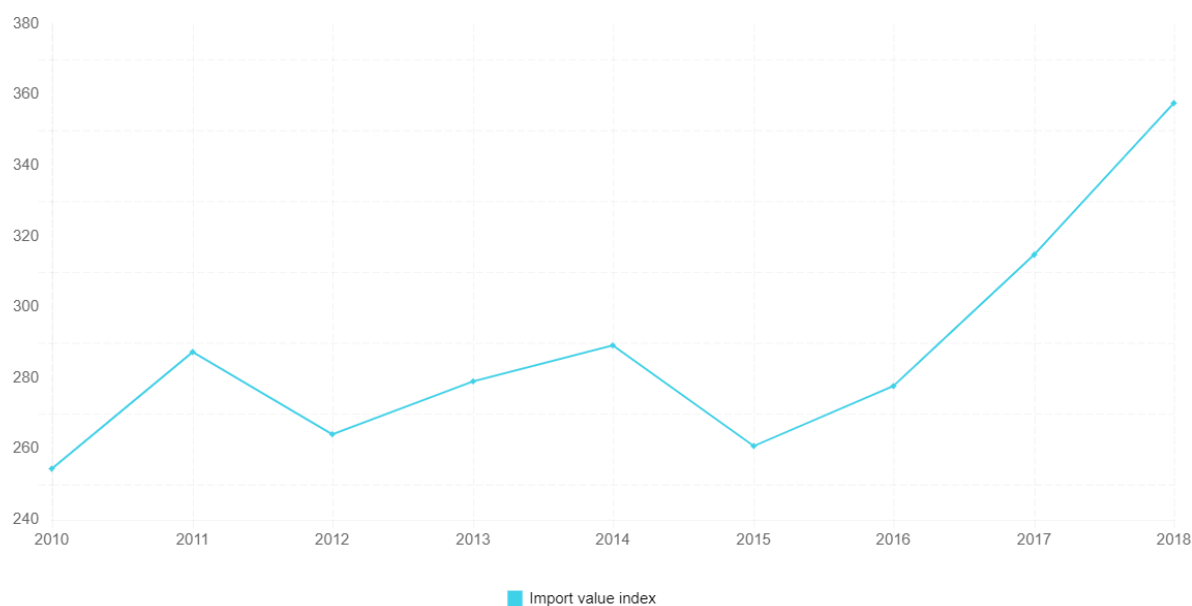
⁽⁴⁶⁾ Eurostat, Material flow accounts statistics, http://ec.europa.eu/eurostat/product?code=env_ac_mfa&language=en&mode=view

8 Trade

8.1 Import value index

Definition: Data are provided by World Bank, World Development Indicators, based on United Nations Conference on Trade and Development, Handbook of Statistics and data files, and International Monetary Fund, International Financial Statistics. For calculation of this index, import values are the current value of imports (f.o.b.) converted to U.S. dollars and expressed as a percentage of the average for the base period (year 2000).

Figure 15. Import value index (2000 = 100)⁽⁴⁷⁾

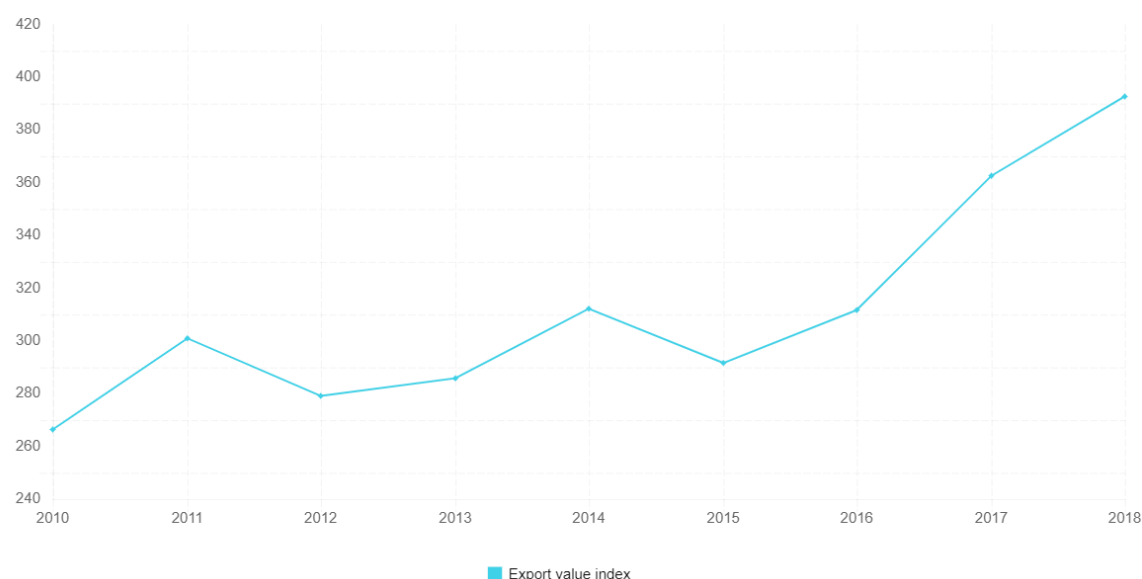


8.2 Export value index

Definition: Data are provided by World Bank, World Development Indicators, based on United Nations Conference on Trade and Development, Handbook of Statistics and data files, and International Monetary Fund, International Financial Statistics. For calculation of this index, export values are the current value of exports (f.o.b.) converted to U.S. dollars and expressed as a percentage of the average for the base period (year 2000).

⁽⁴⁷⁾ World Bank, World Development Indicators, <https://data.worldbank.org/indicator/TM.VAL.MRCH.XD.WD>

Figure 16. Export value index (2000 = 100) ⁽⁴⁸⁾



8.3 Raw materials' physical trade balance by selected material category

Definition: Physical trade balance is calculated as imports minus exports, by material category.

Table 10. Raw materials' physical trade balance by selected material category (million tonnes)⁽⁴⁹⁾

Material category	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Metal ores (gross ores)	1.2	0.7	0.5	0.3	0.3	0.4	0.5	0.6	0.8	0.6	0.7
Non-metallic minerals	0.0	-2.8	-3.2	-1.5	-0.1	-1.5	-2.4	-1.6	-1.7	-1.5	-1.5
Wood	-1.2	-1.3	-1.6	-1.9	-2.0	-2.3	-2.6	-2.5	-2.6	-2.5	-2.1

8.4 Exports, imports and trade balance by HS Standard Product Group

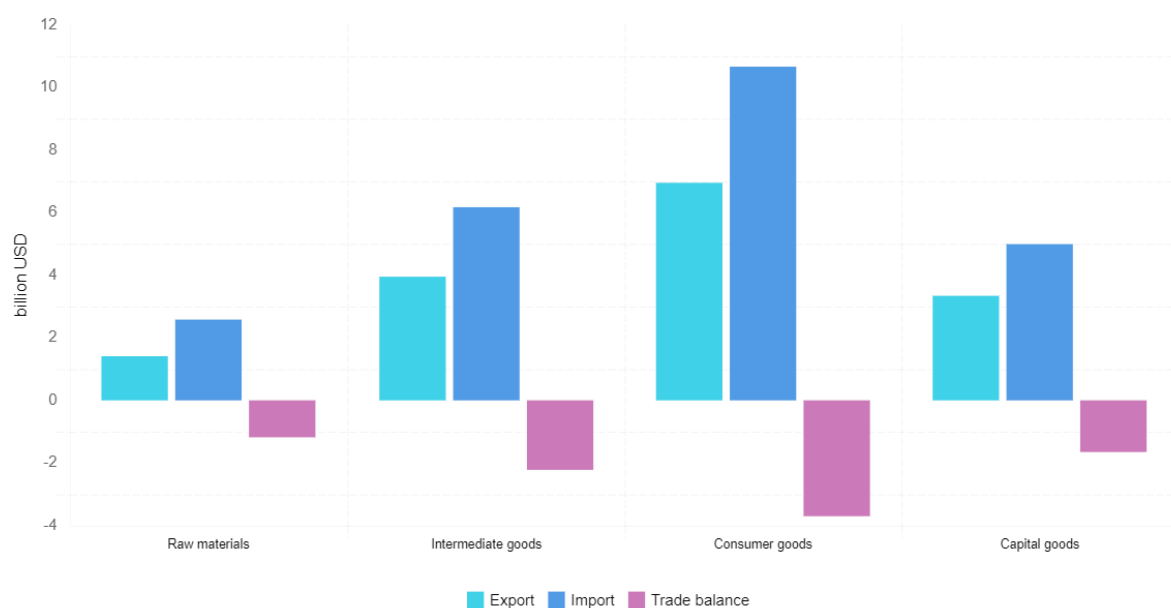
The four HS Standard Product Groups provided by UNCTAD - i.e. Raw Materials (SoP1), Intermediates (SoP2), Consumer Goods (SoP3) and Capital Goods (SoP4) – are commodity aggregates that include also food- and energy-related products⁽⁵⁰⁾. They are available in the predefined product clusters of the Advanced Query tool of the World Integrated Trade Solutions database (WITS).

⁽⁴⁸⁾ World Bank, World Development Indicators, <https://data.worldbank.org/indicator/TX.VAL.MRCH.XD.WD>

⁽⁴⁹⁾ Eurostat, Material flow accounts statistics, http://ec.europa.eu/eurostat/product?code=env_ac_mfa&language=en&mode=view

⁽⁵⁰⁾ WITS Reference Data, <https://wits.worldbank.org/referencedata.html>

Figure 17. Exports, imports and trade balance by HS Standard Product Group in 2017 ⁽⁵¹⁾



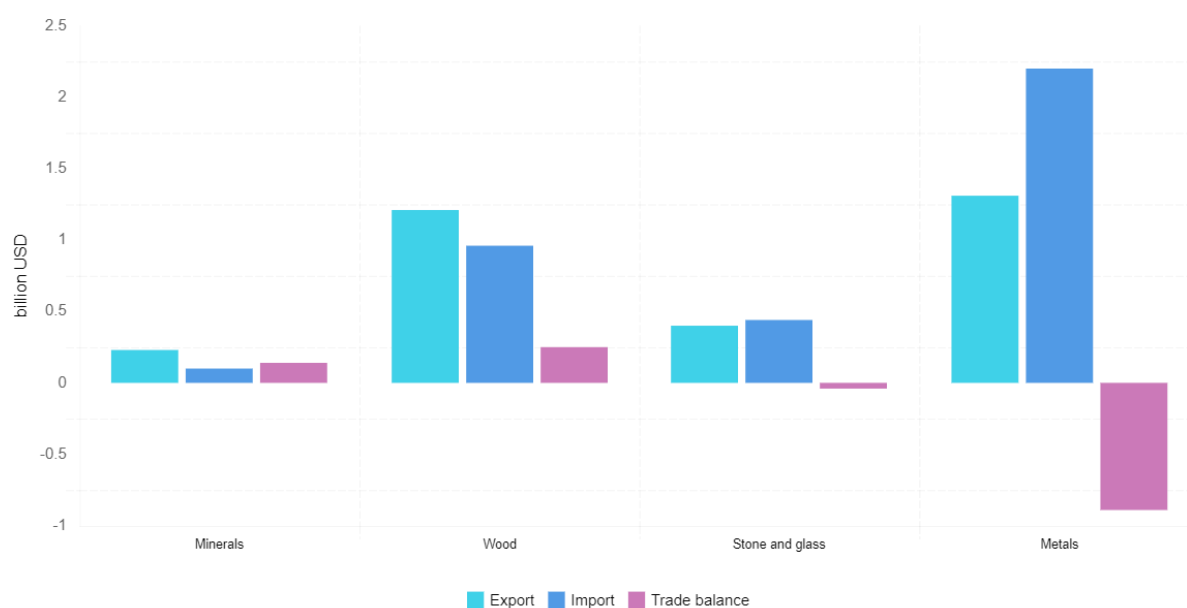
8.5 Exports, imports, and trade balance by selected HS commodity group

The selected HS commodity groups are:

1. Metals (HS chapters 72-83),
2. Minerals (HS chapters 25 and 26),
3. Stone and Glass (HS chapters 68-71)
4. Wood (HS chapters 44-49).

These selected commodity groups contain non-food, non-energy raw material commodities. They are available in the predefined product clusters of the Advanced Query tool of the World Integrated Trade Solutions database (WITS).

Figure 18. Exports, imports and trade balance by selected HS commodity group in 2017⁽⁵²⁾



⁽⁵¹⁾ World Integrated Trade Solution (WITS), <https://wits.worldbank.org/>

⁽⁵²⁾ World Integrated Trade Solution (WITS), <https://wits.worldbank.org/>

8.6 Exports, imports and trade balance by selected HS chapter

The selected HS chapter contain HS 6-digit non-food, non-energy raw material commodities.

Table 11. Exports, imports and trade balance by selected HS chapter in 2017 (million USD)⁽⁵³⁾

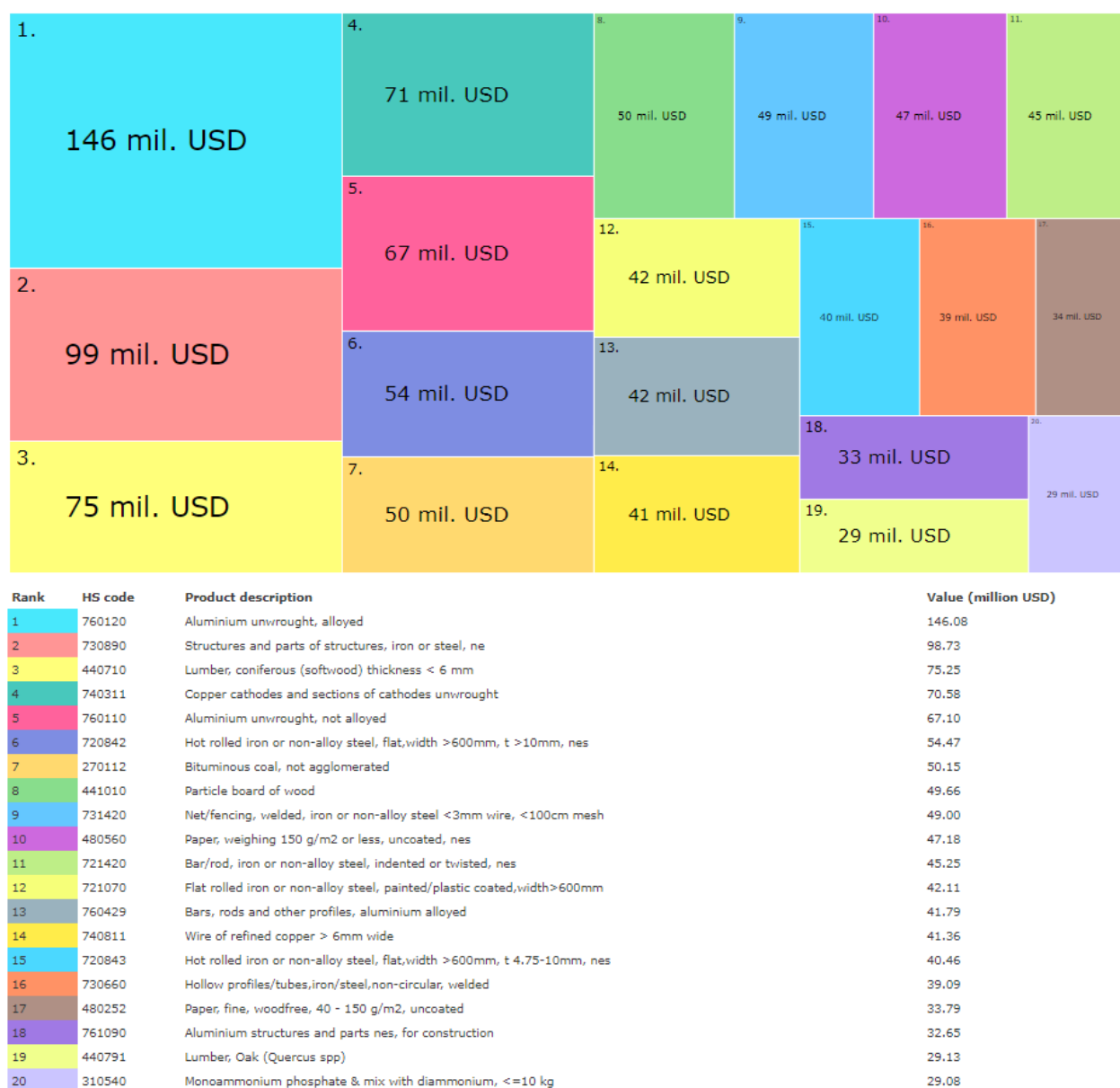
HS chapter	HS chapter name	Export	Import	Trade balance
25	Salt; sulphur; earths and stone; plastering materials, lime and cement	215.5	80.2	135.3
26	Ores, slag and ash	19.0	16.1	2.9
27	Mineral fuels, mineral oils and products of their distillation; bituminous substances; mineral waxes	1684.9	3288.4	-1603.4
28	Inorganic chemicals; organic or inorganic compounds of precious metals, of rare-earth metals, of radioactive elements or of isotopes	25.3	69.4	-44.1
31	Fertilisers	215.3	118.6	96.7
40	Rubber	80.0	267.1	-187.1
44	Wood and articles of wood	859.5	335.6	524.0
45	Cork and articles of cork	0.1	2.4	-2.3
71	Natural or cultured pearls, precious or semi-precious stones, precious metals, metals clad with precious metal, and articles thereof	46.3	50.4	-4.2
72	Iron and steel	154.4	597.9	-443.5
74	Copper and articles thereof	69.3	191.1	-121.8
75	Nickel and articles thereof	0.7	14.1	-13.4
76	Aluminium and articles thereof	479.2	468.4	10.7
78	Lead and articles thereof	12.9	2.3	10.6
79	Zinc and articles thereof	3.0	16.6	-13.6
80	Tin and articles thereof	0.1	1.0	-1.0
81	Other base metals; cermets; articles thereof	3.4	4.7	-1.2

⁽⁵³⁾ World Integrated Trade Solution (WITS), <https://wits.worldbank.org/>

8.7 Top 20 non-food, non-energy raw material commodities

The Top 20 non-food, non-energy raw material commodities imported in 2017 and Top 20 non-food, non-energy raw material commodities exported in 2017 indicators present the country's top 20 HS 6-digit non-food, non-energy raw materials imported/exported in 2017, based on the database built in the of Raw Materials Information System's Economics & Trade module.⁽⁵⁴⁾

Figure 19. Top 20 non-food, non-energy raw material commodities imported in 2017 ⁽⁵⁵⁾

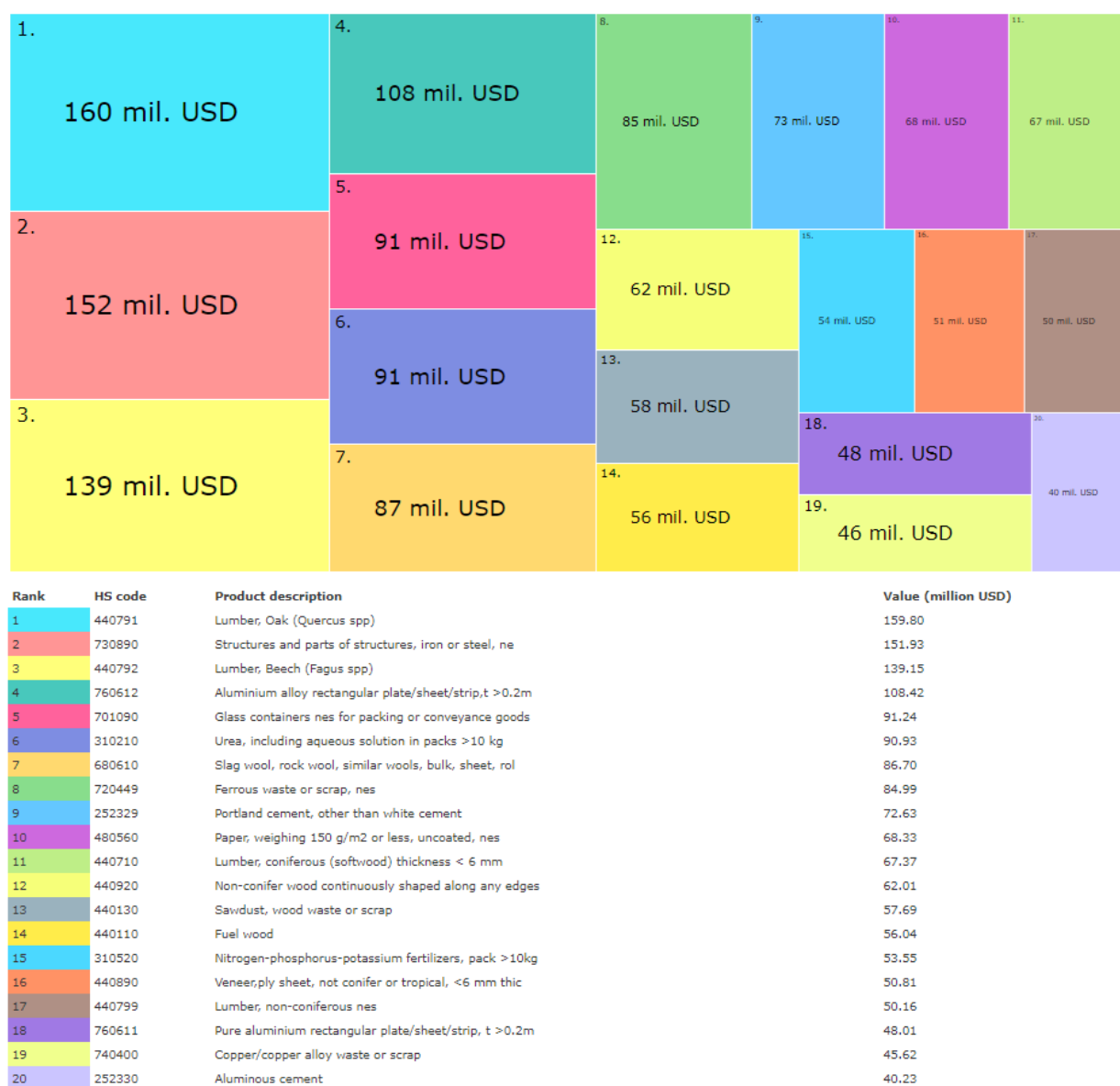


Total imports of raw material commodities in 2017: **2564** million USD

⁽⁵⁴⁾ For further details, see Raw Materials Information System, Methodological Overview section - <http://rmis.jrc.ec.europa.eu/?page=methodological-overview-f5f020>

⁽⁵⁵⁾ Raw Materials Information System, Economics & Trade module, section Raw Materials Trade Flows, <https://rmis.jrc.ec.europa.eu/?page=trade-flows#/>

Figure 20. Top 20 non-food, non-energy raw material commodities exported in 2017 ⁽⁵⁶⁾



Total exports of raw material commodities in 2017: **2390** million USD

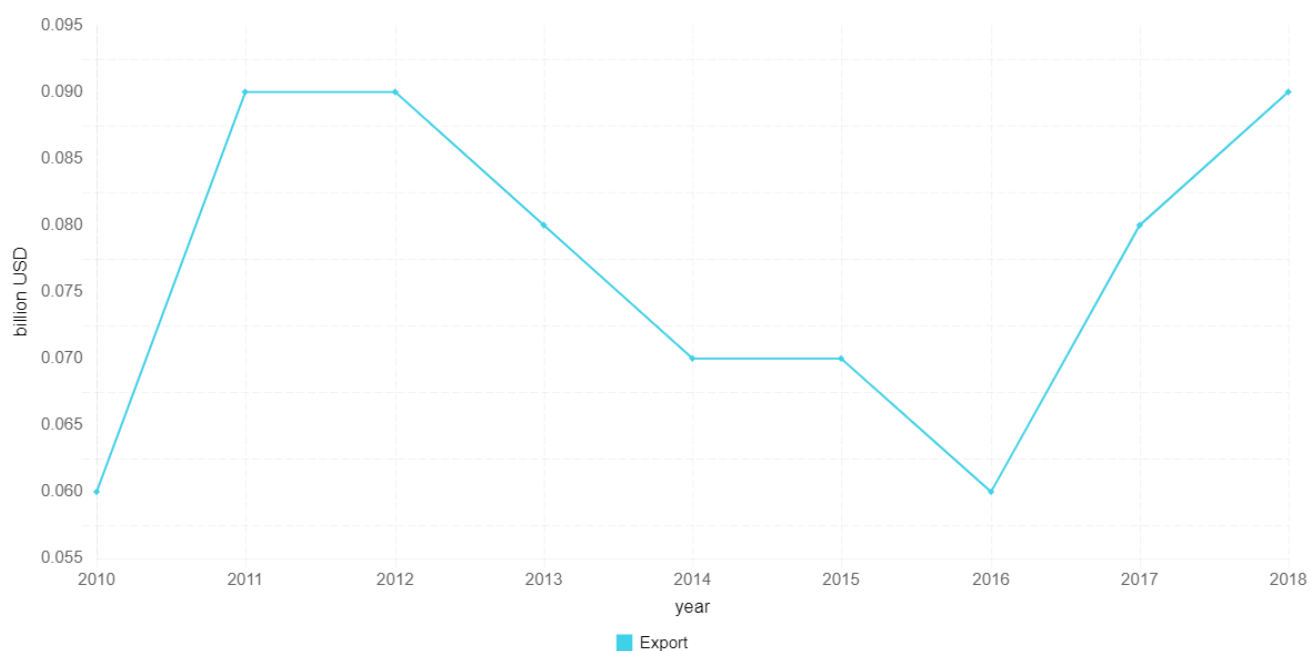
⁽⁵⁶⁾ Raw Materials Information System, Economics & Trade module, section Raw Materials Trade Flows, <https://rmis.jrc.ec.europa.eu/?page=trade-flows#/>

8.8 Exports of mining equipment

This indicator was developed by JRC, based on data from UN Comtrade, accessed via World Bank's World Integrated Trade Solution. The starting point for identifying the mining-equipment-related commodities were the products covered by the 4-digit NACE class 28.92, Manufacture of machinery for mining, quarrying and construction.

For more methodological details and the list of 21 six-digit HS codes covered by this indicator, see Raw materials scoreboard 2018, Methodological notes, Mining equipment exports.⁽⁵⁷⁾

Figure 21. Exports of mining equipment⁽⁵⁸⁾



⁽⁵⁷⁾ <https://publications.europa.eu/en/publication-detail/-/publication/117c8d9b-e3d3-11e8-b690-01aa75ed71a1>

⁽⁵⁸⁾ World Integrated Trade Solution (WITS), <https://wits.worldbank.org/>

9 Environment

9.1 Land used by mining sites and other activities

Definition: Mineral extraction sites (category 1.3.1): Areas with open-pit extraction of industrial minerals (sandpits, quarries) or other minerals (opencast mines). Includes flooded gravel pits, except for river-bed extraction. Urban areas refers to the sum of *continuous urban fabric* (land use category 1.1.1) and *discontinuous urban fabric* (land use category 1.1.2), which cover, respectively, land where buildings, roads and artificially surfaced area cover almost all the ground, and land where buildings, roads and artificially surfaced areas associated with vegetated areas and bare soil, which occupy discontinuous but significant surfaces. Agricultural areas are the sum of categories 2.1.1-2.4.4, which include arable land, rice fields, permanent crops, pastures, and heterogeneous agricultural areas. Forests cover broad-leaved forest (category 3.1.1), coniferous forest (category 3.1.2) and mixed forest (category 3.1.3). The percentage of the total area related to the official country area as reported by the Eurostat ⁽⁵⁹⁾. The net change refers to the area of each land use in 2012 minus the area in 2006, divided by area in 2006.

Table 12. Land used by mining sites and other activities⁽⁶⁰⁾

	Area (Km2) 2012	Percentage of country area 2012	Net change 2006-2012
Mineral extraction sites	51	0.09%	4.8%
Construction sites	17	0.029%	-3.5%
Urban	1474	2.6%	0.3%
Agricultural areas	22810	40.3%	-0.06%
Forests	20201	35.7%	-0.83%

9.2 Greenhouse gas emissions and emissions intensity by raw materials sector

Definition: Greenhouse gas emissions refer to absolute emissions covering CO₂, N₂O and CH₄, measured in CO₂ equivalent). Emissions intensity presents intensity-ratios relating emissions to economic parameters, in this case gross value added, chain linked volumes (2010). Data are displayed for a selection of raw materials sectors (following the NACE Rev.2 classification). For absolute emissions, data are presented also for the sum of all economic activities. For emission intensity, average emission intensity for all NACE activities is also displayed. Concepts and principles are the same as in national accounts.

⁽⁵⁹⁾ <https://europa.eu/european-union/about-eu/countries/member-countries/>

⁽⁶⁰⁾ JRC calculation based on data from European Environment Agency, CORINE land cover 2012 and 2006, <https://land.copernicus.eu/pan-european/corine-land-cover>

Figure 22. Absolute greenhouse gas emissions ⁽⁶¹⁾

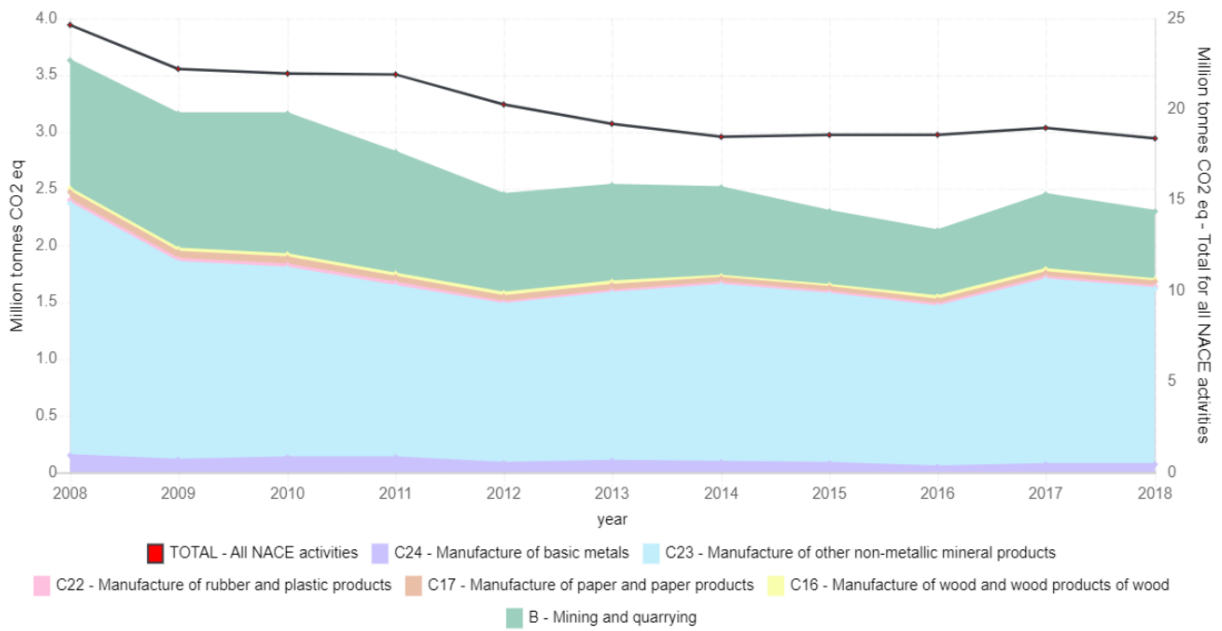
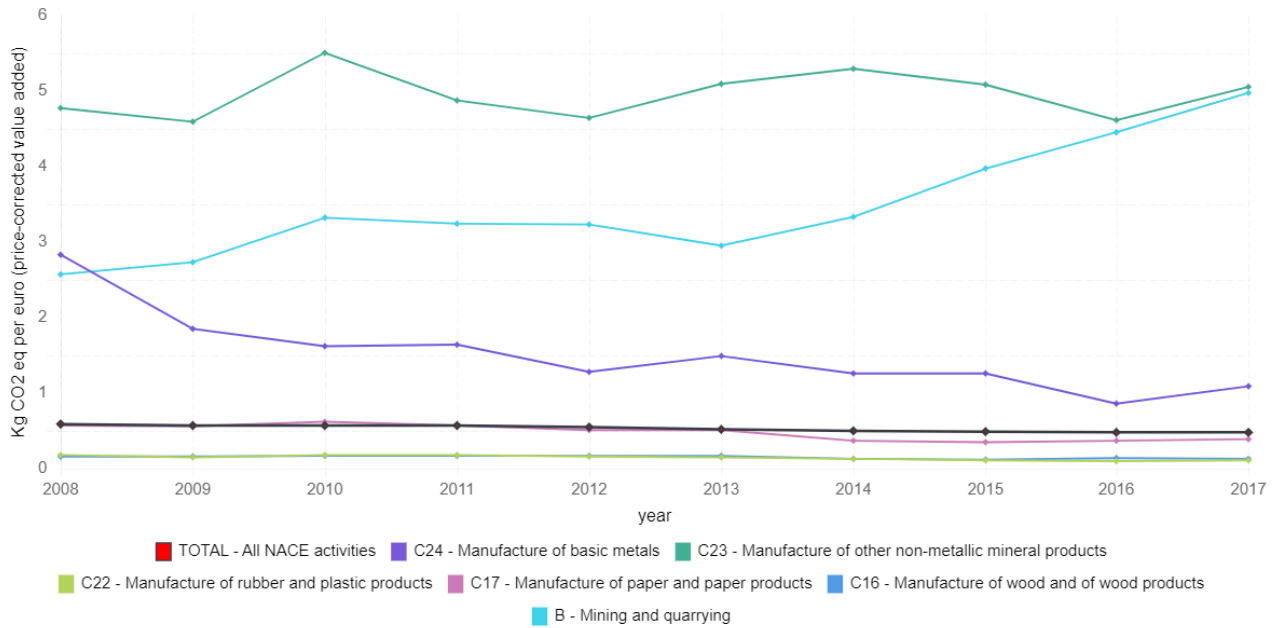


Figure 23. Greenhouse gas emissions intensity (emissions per gross value added)⁽⁶²⁾



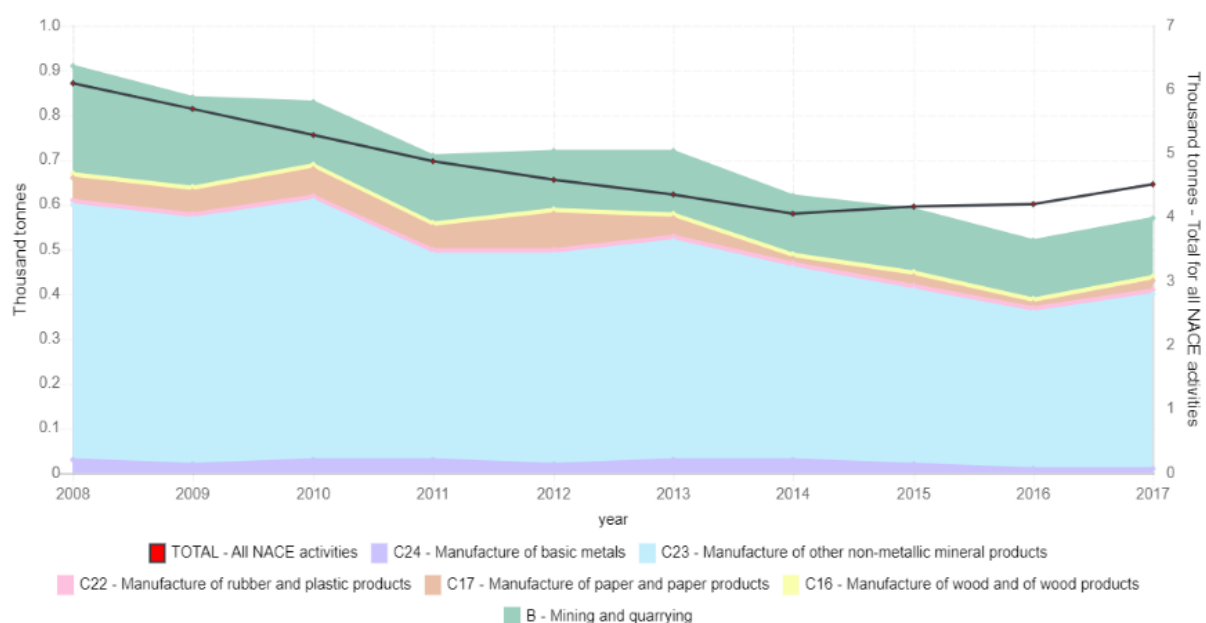
⁽⁶¹⁾ Eurostat, Air emissions accounts by NACE Rev. 2 activity, code: env_ac_ainah_r2, and Eurostat

⁽⁶²⁾ Eurostat, Air emissions intensities by NACE Rev. 2 activity, code: env_ac_aeint_r2

9.3 PM_{2.5} emissions and emissions intensity by raw materials sector

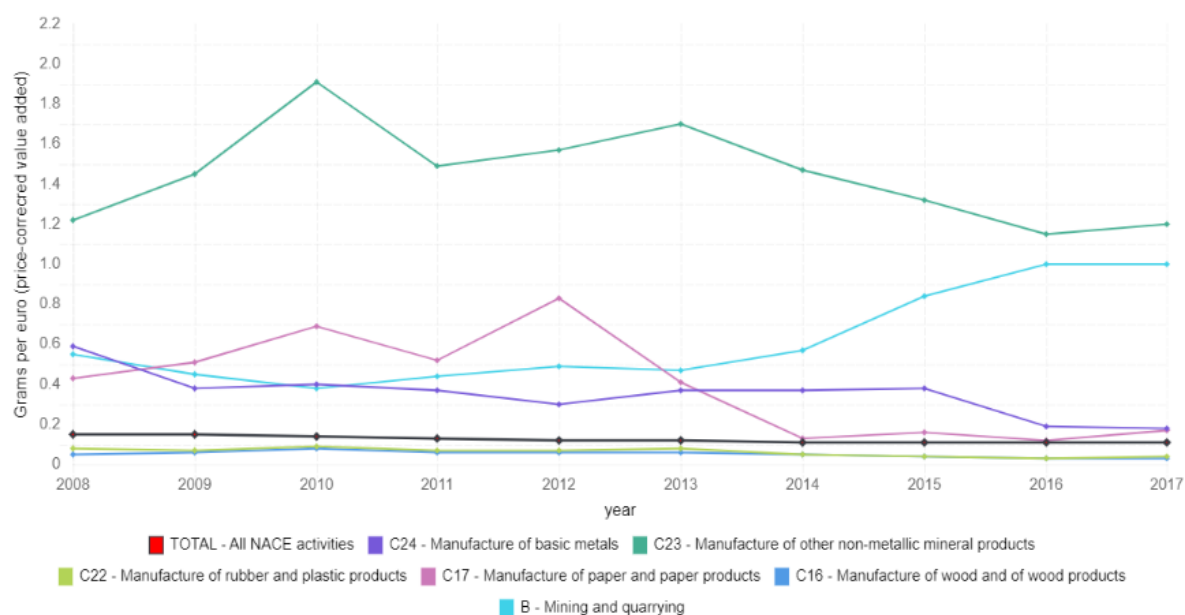
Definition: Particulate matter is a complex mixture of microscopic solid or liquid matter in the air, and a key pollutant affecting human health. PM_{2.5} emissions refer to absolute emissions of PM_{2.5}, which refers to the fraction of particulate matter with a size up to 2.5µm, which are responsible for damages to human health given their higher potential to enter much deeper in the respiratory system. PM_{2.5} emissions intensity presents intensity-ratios relating emissions to economic parameters, in this case gross value added, chain linked volumes (2010). Data are displayed for a selection of raw materials sectors (following the NACE Rev.2 classification). For absolute emissions, data are presented also for the sum of all economic activities. For emission intensity, average emission intensity for all NACE activities is also displayed. Concepts and principles are the same as in national accounts.

Figure 24. Absolute PM_{2.5} emissions⁽⁶³⁾



⁽⁶³⁾ Eurostat, Air emissions accounts by NACE Rev. 2 activity, code: env_ac_ainah_r2

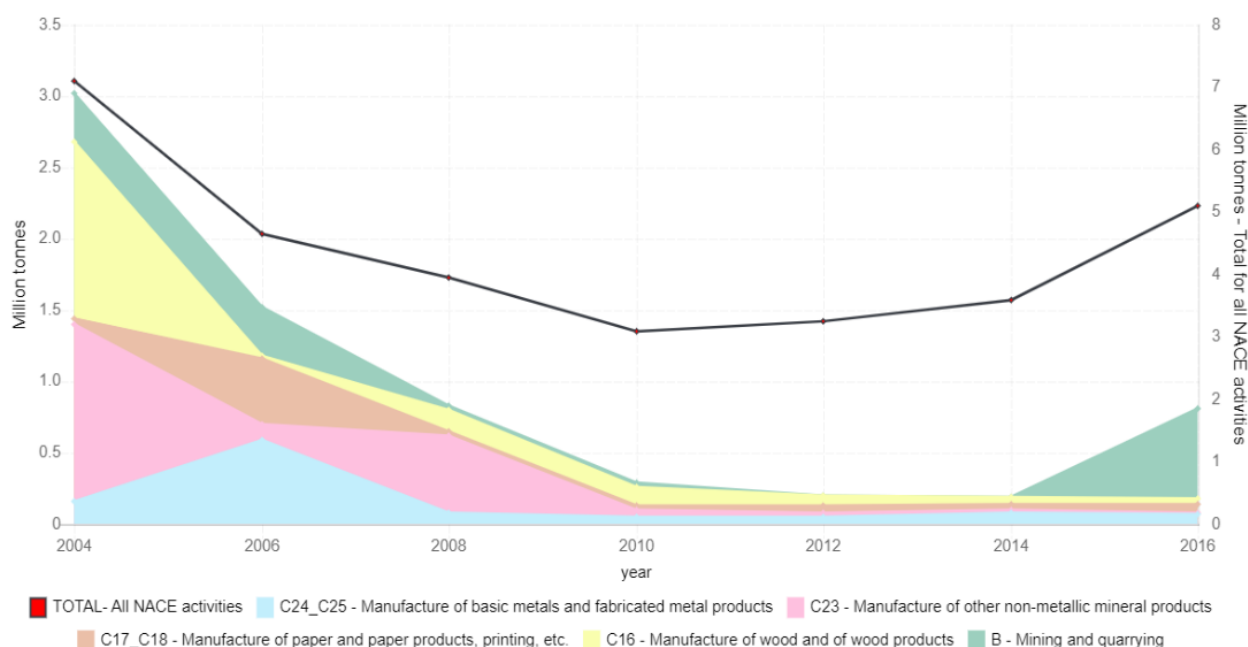
Figure 25. PM_{2.5} emissions intensity (emissions per gross value added)⁽⁶⁴⁾



9.4 Generation of waste by raw materials sector

Definition: Generation of waste by economic sector following the NACE Rev.2 classification as reported by Member States. Waste is considered as any substance or object that the holder discards or intends or is required to discard. The sludges (including the dredging spoils) are measured in dry matter. These data include all typologies of hazardous and non-hazardous waste.

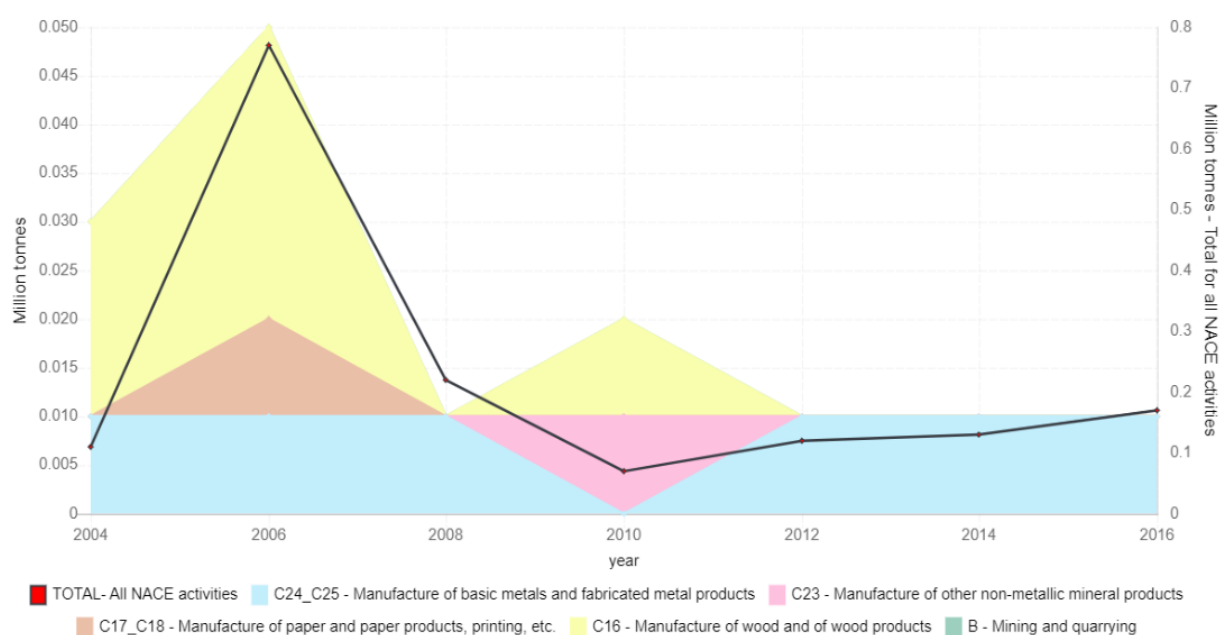
Figure 26. Non-hazardous waste ⁽⁶⁵⁾



⁽⁶⁴⁾ Eurostat, Air emissions intensities by NACE Rev. 2 activity, code: env_ac_aeint_r2

⁽⁶⁵⁾ Eurostat, Generation of waste by waste category, hazardoussness and NACE Rev. 2 activity, dataset code env_wasgen.

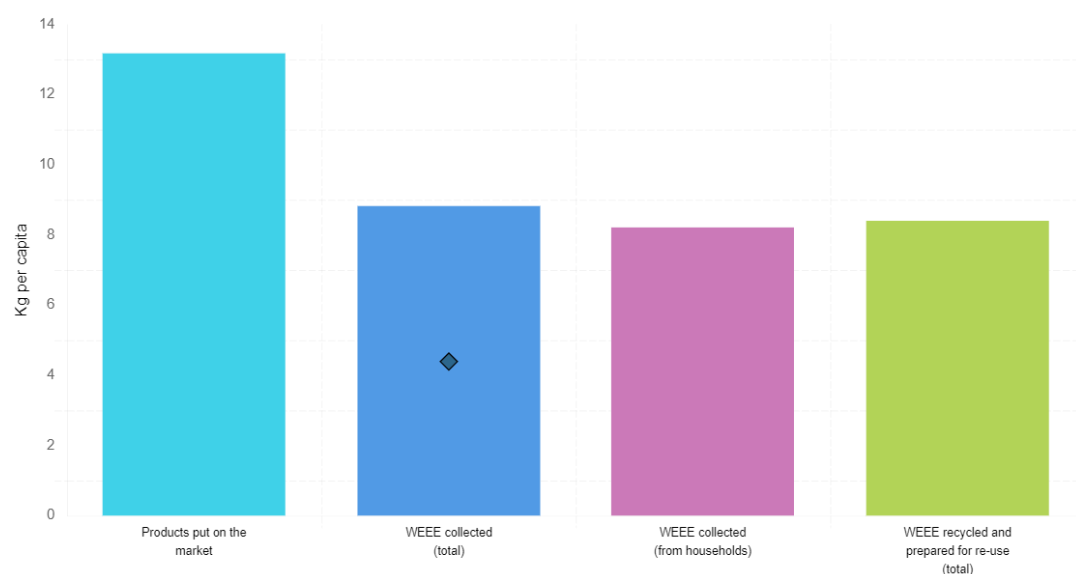
Figure 27. Hazardous waste ⁽⁶⁶⁾



9.5 Waste of Electrical and Electronic Equipment (WEEE) management

Eurostat reports statistics of on WEEE collected (total and from households) based on data reported by Member States. Statistics include also the amounts of total WEEE 'recycled and prepared for re-use', and the detail of WEEE prepared for re-use. Target on WEEE collection from households: The Directive 2012/19/EU on WEEE established (article 7) that, from 2016, the minimum collection rate in a given year in a Member State shall be 45 % of the EEE placed on the market, expressed as a percentage of the average weight of EEE placed on the market in the three preceding years in that Member State.

Figure 28. Waste of Electrical and Electronic Equipment (WEEE) management in 2017⁽⁶⁷⁾



⁽⁶⁶⁾ Eurostat, Generation of waste by waste category, hazardousness and NACE Rev. 2 activity, dataset code env_wasgen

⁽⁶⁷⁾ Eurostat, Waste electrical and electronic equipment (WEEE) by waste operations [env_waselee].

10 Social & Policy

10.1 Worldwide Governance Indicators

Definition: The *Worldwide Governance Indicators* cover over 200 countries and territories, measuring six dimensions of governance: Voice and Accountability, Political Stability and Absence of Violence/Terrorism, Government Effectiveness, Regulatory Quality, Rule of Law, and Control of Corruption. The aggregate indicators are based on several hundred individual underlying variables, taken from a wide variety of existing data sources. The data reflect the views on governance of survey respondents and public, private, and NGO sector experts worldwide. The WGI also explicitly report margins of error accompanying each country estimate. These reflect the inherent difficulties in measuring governance using any kind of data. Even after taking these margins of error into account, the WGI permit meaningful cross-country and over-time comparisons.⁽⁶⁸⁾

Table 13. Worldwide Governance Indicators (2018)⁽⁶⁹⁾

Indicator	Score*	Percentile rank
Voice and accountability	0.50	64.53
Political Stability and Absence of Violence/Terrorism	0.77	73.81
Government Effectiveness	0.46	69.23
Regulatory Quality	0.45	68.27
Rule of Law	0.32	62.98
Control of Corruption	0.13	60.10

*Highest performance: +2.5; Lowest performance: -2.5

Percentile range: ■ 0-10th ■ 10-25th ■ 25-50th ■ 50-75th ■ 75-90th ■ 90-100th

10.2 Policy Perception Index

Definition: The Policy Perception Index assesses the public regulatory framework that affects investment, i.e. how government policy affects attitudes towards exploration investment in each mining jurisdiction, ranking jurisdictions based on the responses to the Annual Survey of Mining Companies done by the Fraser Institute.

It measures the overall policy attractiveness of 91 jurisdictions through annual survey of mining and exploration companies.⁽⁷⁰⁾

Croatia: n.a.

⁽⁶⁸⁾ Kaufmann, Daniel and Kraay, Aart and Mastruzzi, Massimo, The Worldwide Governance Indicators: Methodology and Analytical Issues (September 2010). World Bank Policy Research Working Paper No. 5430. Available at SSRN: <https://ssrn.com/abstract=1682130>

⁽⁶⁹⁾ World Bank (2017): Worldwide Governance Indicators. Internet: <http://info.worldbank.org/governance/wgi/#reports>

⁽⁷⁰⁾ <https://www.fraserinstitute.org/sites/default/files/survey-of-mining-companies-2017.pdf>

10.3 Country risk: INFORM index

Definition: INFORM is a global, open-source risk assessment for humanitarian crises and disasters. It is developed by JRC and can support decisions about prevention, preparedness and response. It builds up a picture of risk by bringing together around 50 different indicators that measure three dimensions of risk: Hazard and exposure (events that could occur and the people or assets potentially affected by them); Vulnerability (the susceptibility of communities to those hazards); Lack of capacity (lack of resources available that can help absorb the shock)

Table 14. Country risk: INFORM index (2019)⁽⁷¹⁾

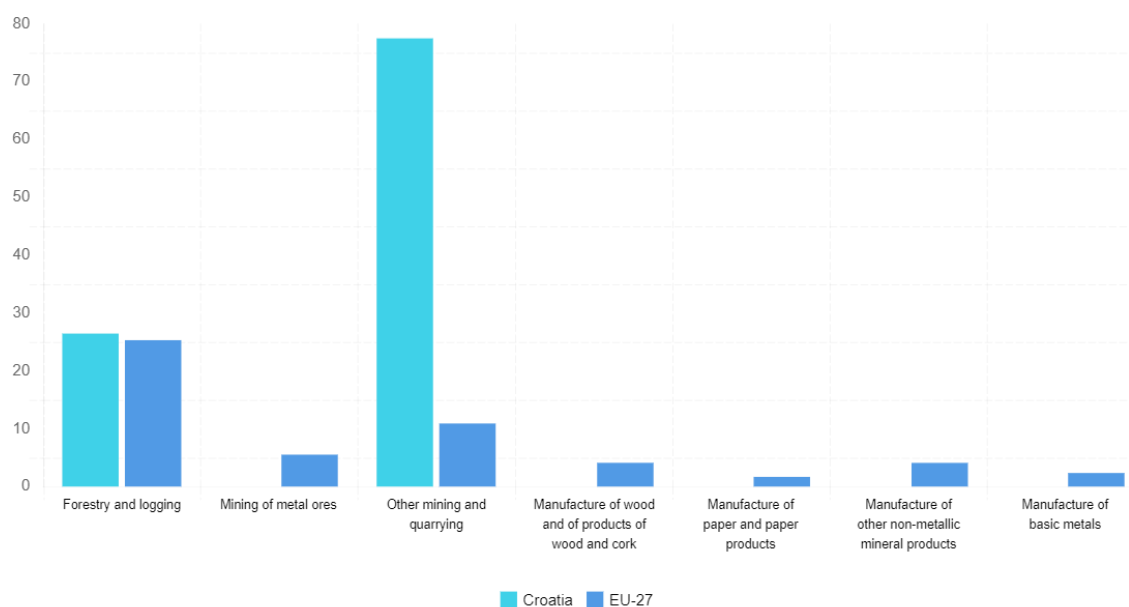
Components	Score*	Risk class
Hazard and exposure	2.9	Low
Vulnerability	1.1	
Lack of capacity	3.2	
INFORM index	2.2	

* a lower value (closer to 0) represents a lower risk and a higher value (closer to 10) represents a higher risk.

10.4 Occupational safety: rate of fatal accidents at work

Definition: The incidence rates express the number of accidents at work in relation to the number of persons employed, in economic activities related to raw materials sectors.

Figure 29. Occupational safety: rate of fatal accidents at work (incidents per 100k employees; 2017)⁽⁷²⁾



⁽⁷¹⁾ <http://www.inform-index.org/>

⁽⁷²⁾ Eurostat, Accidents at work (ESAW, 2008 onwards) (hsw_acc_work), [hsw_n2_02]
https://ec.europa.eu/eurostat/cache/metadata/en/hsw_acc_work_esms.htm

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doi:10.2760/17

ISBN 978-92-76-22976-6