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### General Meeting of HIPH's Members

On 20 May 2010, 23rd General Meeting of the Members of the Polish Steel Association took place in Katowice. It was a reporting and electoral meeting. The General Meeting granted the vote of acceptance to the HIPH's Management Board and Council.

New governing bodies of the Association for the period 2010-2012 were appointed. Two-man composition of the Board and eight-man composition of the Council were retained.

23rd General Meeting of the Association adopted many important resolutions. Minutes from the General Meeting and copies of all resolutions as well as the most vital theses from the discussion held during the Meeting were disseminated among members of the Association.

### TUBE'2010

From 12 to 16 April 2010, we were actively involved in the World's Largest Trade Fair TUBE& WIRE'2010 (T&W) which was held in Duesseldorf. The Polish Steel Association had a joint stand with Huta Batory Sp. z o.o. , ISD Huta Czestochowa Sp. z o.o. and WM Dziedzice S.A. to present and promote products of the Polish tube manufacturers. The stand attracted a big audience. During the 5-day fair, we held around 250 meetings with the clients already known to us as well as the new ones. Our visitors and people we met expressed a particularly big interest in seamless tubes in boiler grades and drill pipes with API monogram. During a meeting at HIPH which was to sum up the fair, the visitors confirmed their interest in attending the next edition of T&W in 2012.

### Economic Committee

During a meeting of the EUROFER's Economic Committee held on 13 April 2010 in Brussels, the current situation on the steel market in the EU (27) and in particular member countries was discussed. The steel consumption prognosis for 2010 and 2011 was presented. In spite of the disappointing results in 4th Q of 2009 and the whole of 2009, ECON does not regard the current economic slow-down as another worsening of the economic trend. On the

contrary, the activity in manufacturing and services is expected to strengthen. A visibly lower stock level kept by traders affects the steel manufacture as well. Orders placed with steelworks in early 2010 are higher than a year ago. 14% increase in steel consumption in the EU (27) is forecasted in 2010. Construction has the least optimistic prognosis in the segment of the European steel consuming industries (-4.7%). The estimates for the remaining industries are better (automotive: +5%, white goods: +1.5%, machinery construction: moderate growth, steel tubes: +4%). In trade, a well-balanced import-export relation is expected.

### Standpoint on prices of iron ores

In a letter filed under number HIPH/0848/2010 of 21 April 2010, HIPH's Management Board supported the EUROFER's standpoint on prices of iron ores. EUROFER, in which the Association is a member, asked the European Commission to examine the circumstances of monopolistic practices by the three largest iron ore suppliers such as Rio Tinto, BHP Billinton and Vale.

### Climate Change Committee

On 6 May 2010, the Ministry of Environment in Warsaw hosted the second meeting of the Steering Committee for the climate change adaption strategy. The Committee is composed of the representatives of different ministries, environmental institutes and organisations representing the economic circles (HIPH participated as a representative of the industry). The Committee's main objective is to organise the activity aimed at preparing the Strategy including in particular: problem identification, division of competencies and indication of the financing ways for elaboration of the sectoral climate change adaptation strategies. The Committee will appoint meritorious units to prepare the Strategy. White Paper of the European Commission specifies the sectors which will be most affected by the climate change. In the Association's opinion, the steel industry should also be addressed with the strategy to reduce and control the climate change effects and, therefore, we are present in

the Committee.

### **K. Adenauer's Foundation at HIPH**

The second meeting of the members of K. Adenauer's Foundation with the Management Board of the Association was held at HIPH's office on 5 May 2010. The President, R. Talarek delivered a speech on "Domestic steel industry and the related industries capable for sustainable development". An interesting discussion came out concerning the German and Polish experiences in the present conduct of employers and employees facing the economic slow-down caused by the crisis and the increasing competition of Asian firms.

### **Trade Mission from the Ukraine**

On 18 May 2010, HIPH's Management Board hosted the Ukrainian delegation of coke plants and steelworks consisting of Nikolai Gizenko, Director General of UKR-TSVETMET, Starovoyt Anatoly, Director General of UKRKOKS and Mychajło Brodowycz, the General Consul of the Ukraine in Cracow.

The President, R. Talarek, informed the delegation about the activity carried out by the Association, legal regulations governing the performance of sectoral trade associations in Poland and the forms and scope of international collaboration. It was acknowledged that the next meeting should take place in the Ukraine. Both parties agreed that similar contacts should be expanded into other subsectors and perform within the framework of "the Eastern Partnership".

### **Steel Workers' Day for HIPH's Members**

The atmosphere of celebration of the Steel Workers' Day this year was much influenced by the prolonging effects of the last year's economic crisis, the Smoleńsk tragedy and floods in Poland. The vast majority of the celebrations took place in the atmosphere full of concern over these events.

- 30.04.2010 at Huta Łabędy S.A. - chamber celebrations were held. On behalf of the Board we extended our congratulations for 2009,
- 04.05.2010 at Huta Pokój S.A. celebration organised by the Board mainly for the workers of the steelwork and their

families. The Management Board of the Association forwarded congratulations for the successful establishment of a strong competitive position on the market of cold-rolled sections and prefabrication of steel products,

- 07.05.2010 - during celebration at AGH in Cracow, we passed our congratulation letter to His Magnificence Rector, Professor Antoni Tajduś for his teaching and scientific accomplishments,

- 14.05.2010 under celebration of the Steel Workers' Day at Celsa Huta Ostrowiec a conference took place. The President of HIPH delivered a speech on: "Conditions for sustainable development of the domestic steel industry". We extended the special-event wishes and congratulation letter for Mr Pere Petit in connection with his appointment as the President of the Board of Celsa Huta Ostrowiec Sp. z o.o.

- 14.05.2010 celebration at the Department of Material Engineering and Metallurgy of the Silesian University of Technology in Katowice. We forwarded our congratulation letter to Dean, Professor Wojciech Szkliniarz.

- 21.05.2010 - at the Czestochowa University of Technology celebrations were held on the occasion of the Steel Workers' Day along with the 60th Anniversary of the Department of Process and Material Engineering and Applied Physics. Dean, Professor Henryk Dyja received the event-related congratulations and wishes from us.

- 21.05.2010 at ISD Huta Częstochowa Sp. z o.o. the celebrations on the occasion of the Steel Workers' Day were held with a moderate optimism in connection with the improving situation in the plates market. We forwarded our congratulations for successful implementation of the long term programme for adopting technologies and products to the needs of today's market and for the latest shareholder changes.

- 22.05.2010 at the University of Technology in Gliwice we participated in the celebration of the Steel Workers' Day and 65th Anniversary of the University. We passed our congratulation letter to His Magnificence Rector, Professor Andrzej Karbownik.

### **35th Anniversary of ZM Ropczyce**

On 23 and 24 April 2010, on the occasion of the 35th Anniversary of ZM "Ropczyce" S.A.

Zakopane hosted a conference presenting the achievements and the market position of this refractory manufacturer.

To numerous wishes and congratulations, the Management Board added the sector's wishes, on behalf of all the members represented by HIPH.

### **65 years of IMZ**

On 28 and 30 April 2010, the Iron Metallurgy Institute celebrated its 65th Anniversary in Gliwice and Ustroń. During an international conference held under the title: "Steel for the modern society technologies and products", the President of HIPH made a speech on: "The modern and local market oriented steel industry facing the challenges arisen from global economic crisis".

### **Polish Steel Technological Platform**

On 30 April 2010, a meeting of the Steering Committee of the Polish Steel Technological Platform took place in Ustroń. President of the Board of HIPH is a member of the Committee.

### **HIPH speaking for the National Section of NSZZ Solidarity**

On 24 May 2010, a seminar was organised by NSZZ Solidarity in Katowice. The seminar was held under the title: "Location policy and de-location of work places in Europe". It was an international seminar. The President of the Association joined discussion panel by presenting the sector's standpoint on the phenomenon of de-location of steel production. It was emphasised in the discussion that relocating production leads to negative effects for workers while for big corporations it is an element of the production link network which complements trading bonds to a great extent.

### **On SBB meets Poland**

On 29 April 2010, the Hotel Rubinstein in Cracow hosted a meeting (with participation of the Association) which introduced presentations of the experts from Steel Business Briefing.

The meeting provided an opportunity of presenting opinions about SBB and establishing new contacts from the metal sector.