



Agenda Release

Please Note: This is not the final programme and may be subject to change

2023 LONDON INDABA

***Why Africa is important for the future of mining
and mining important for the future of Africa
Africa's critical role in the minerals and metals of the future***

26th & 27th June 2023, InterContinental Park Lane, London

Conference Day One: Monday 26 June 2023

08h45-09h00 **Chairman's Welcome**
Bernard Swanepoel

09h00-10h00 **Opening Keynote Session**
Why Africa is important to the future of mining

Fireside Chat with Industry Legend Robert Friedland

Bernard Swanepoel in conversation with
Robert Friedland, *Founder, Executive Director and Co-Chairman,*
Ivanhoe Mines

10h00-10h30 **Keynote Address: The U.K. Government's Critical Minerals Strategy**

Nusrat Ghani MP
Minister of State for the Department of Business & Trade and
Minister of State for the Investment Security Unit
United Kingdom

Introduction by **Simon Thompson**, *Senior Adviser, Rothschild & Co London and*
former Chairman, Rio Tinto

Audience Q&A led by **Bernard Swanepoel**

10h30-10h50 **Keynote Address: What is the strategy of the U.S Government?**

Scott E. Woodard, *Acting Director, Office of Energy Transformation (ETR),
Bureau of Energy Resources (ENR), U.S. Department of State*

10h50-11h00 Audience Q&A

11h00-11h30 Morning Refreshments

11h30-12h20 **Session One, Panel Discussion**

How the world's governments are incentivising future minerals and metals

What are world government strategies around critical minerals and metals?

What are governments in North America, EU, China, UK doing with policy and legislation to incentivise the production of clean energy and how will this benefit Africa?

What will the actual impact of the US' Inflation Reduction Act (IRA) be and how does it compare with current EU green subsidies?

How is the rest of the world catching up with China?

How are governments collaborating with each other?

How to make sense of the supply chains in critical minerals – are they vulnerable or not?

How are governments planning to intervene or collaborate with African countries to establish trading relationships and secure resilient supply chains?

Chair: Christopher Vandome, *Senior Research Fellow, Africa programme,
Chatham House*

Peter Leon, *Partner and global Africa Chair, Herbert Smith Freehills*

Prof Paul Ekins OBE, *Professor of Resources and Environmental Policy, UCL
Institute for Sustainable Resources, University of London*

Ludivine Wouters, *Managing Partner, Latitude Five*

Lawrence Dechambenoit, *Global Head of External Affairs, Rio Tinto*

12h20-12h45 **Keynote Address: How is investing in critical minerals and metals “different”?**

Simon Thompson, *Senior Adviser, Rothschild & Co London and former
Chairman, Rio Tinto*

12h45-13h05 **Live from Fujian**

Zijin Mining Company: Strategies for investing in Africa

Shaoyang Shen, *Deputy President, Zijin Mining Group*

- 13h05-14h05 Lunch Break
- 14h05-14h20 **Session Two**
What does the energy transition and a growing global population mean for mining and mined products?
Market fundamentals underpinning the industry's future
Global supply/demand dynamics / commodity price cycle
Source of future supply; Africa's crucial role
How mining is central to human progress
- Paul Gait, Chief Economist, Anglo American**
- 14h20-15h00 **Opportunities in Africa to meet global demand for minerals and metals in the energy transition**
- Chair: Matthew Chamberlain, CEO, The London Metal Exchange**
- Neal Froneman, CEO, Sibanye-Stillwater**
Thierno Diallo, Head of Business Development, Africa, Rio Tinto
- 15h00-15h30 Afternoon Refreshments
- 15h30-15h50 **Live from Johannesburg**
Keynote Address: Exploring and mining successfully in Africa for 40 years!
- Mark Bristow, President & CEO, Barrick Gold Corporation**
- 15h50-16h00 Q&A led by Bernard Swanepoel
- 16h00-16h30 **Session Three**
The role of copper in the energy transition and the green economy
The role of African copper in future applications
Why is copper considered a critical metal? Which applications is it used for?
Where will future demand for copper come from?
Which are the copper mining jurisdictions and projects in Africa? What new projects are in the pipeline? Will there be enough supply to keep up with increasing demand?
What are the challenges of mining copper in Africa and how are mining companies dealing with them?
ESG and the criticality of responsible copper – communities, value chain transparency, provenance of supply
- Chair: Sinead Ni Mhuircheartaigh, Managing Director, Energy and Natural Resources Sustainability, Accenture**
- Dr Ndoba Joseph Vibetti, CEO, ZCCM Investment Holdings**

16h30-17h15 **Session Four**
Why PGMs?
The future role of PGMs in a low-carbon economy
What are the implications of the global drive for decarbonisation for the PGMs value chain from the stope to the end consumer?
Which PGMs metals will be particularly in demand to enable the energy transition?
Are we over optimistic about the hydrogen economy or is this a real game changer for PGMs?
When will hydrogen applications become mainstream? To what extent will demand for hydrogen offset the anticipated decline in demand for catalytic converters?
What other new applications for PGMs are on the cards in the short to medium term?

Chair: Stephen Forrest, Retired Chairman, SFA (Oxford) Ltd

Nico Muller, CEO, Impala Platinum
Steve Phiri, CEO, Royal Bafokeng Platinum
Natascha Viljoen, CEO, Anglo American Platinum

17h15-17h35 **Fireside Chat**
Opportunities and challenges in modern mining and processing

Bernard Swanepoel in conversation with
Phillip Tobias, CEO, African Rainbow Minerals

17h35-17h45 **Closing remarks from the Chair**

17h45-19h00 **End of Day One and Drinks Reception**

Conference Day Two: Tuesday 27 June 2023

09h00-09h10 **Opening remarks from the Chair**
Bernard Swanepoel

09h10-09h45 **Why mining is important to Africa!**
Can mining turn the energy transition into an economic transition for Africa? How can responsible mining write a new chapter in Africa's development?

Bernard Swanepoel in conversation with
Rohitesh Dhawan, President and Chief Executive Officer, ICMM
(Live from Brisbane)

09h45-11h00 **Session One**
New sources of funding for resources and mining in Africa
Where is funding for future mining going to come from?

Can London's historic role of funding the global mining industry continue in the era of the energy transition?

Where are competitive sources of funding emerging, and how credible are they?

Has the sharp focus on ESG in the UK market created unsurmountable barriers for miners?

What should the UK government and the LSE be doing to encourage investment in critical minerals supply chains, including processing and innovative mining technology start-ups?

Where are the significant sources of funds or mining skills on the ground in African countries going to manifest?

What more could African governments do to make investing in critical metals and minerals more attractive such as tax incentives, less red tape, reducing political risk issues/perceptions?

What innovative financing models are being developed that could help fund the critical minerals space?

Chair: **Dr Fiona Perrott-Humphrey**, *Senior Adviser to Rothschild & Co Mining Team, London*

U.S. Govt backed critical minerals investment

Brian Menell, *Chairman & CEO, TechMet Limited*

Followed by a Panel discussion:

Tom Attenborough, *Head of International Business Development, Primary Markets, London Stock Exchange*

George Cheveley, *Portfolio Manager, Ninety One*

Paul Smith, *Chairman, Trident Royalties and Partner, Voltaire Minerals*

Andrew Trahar, *Co-Founder, Vision Blue Resources*

11h00-11h30 Morning Refreshments

11h30-13h00 **Session Two**

How will gold continue to be relevant in the future?

Gold has been relevant for 3000 years! What about the next 30?

Can gold be considered critical given its 'safe haven' status?

For which applications is gold used (other than investment) and how is demand predicted to evolve in the short to longer term?

How is the price of gold expected to change and what factors could influence its movement?

What opportunities are there for African gold producers to expand their market share?

Chair: **John Reade**, *Market Strategist, Europe & Asia, World Gold Council*

Peter Steenkamp, *CEO, Harmony Gold Mining Company*

Martino De Ciccio, *Deputy CFO & Head of Investor Relations, Endeavour Mining*

Martin Horgan, *CEO, Centamin*

Segun Lawson, *Chief Executive Officer and Director, Thor Explorations*

13h00-14h00 Lunch Break

14h00-15h00 **Session Three**
The Energy Transition: Winners and losers?

Chair: **Roger Baxter**, *CEO, The Minerals Council South Africa*

Coal: winner or loser?

What is the role of coal in meeting the world's energy needs in the short term?

How does coal fit into the big picture?

What is its role during the transition to a low-carbon economy?

Will supply deficits of key metals and minerals delay this transition?

What is the carbon footprint of these metals and minerals? How can mining companies ensure that they are mined without contributing to CO² emissions?

Vuslat Bayoglu, *Managing Director, Menar*

Uranium: winner or loser?

Daniel Major, *CEO, GoviEX Uranium*

Followed by a panel discussion

Professor Imraan Valodia, *Pro Vice-Chancellor: Climate, Sustainability and Inequality, University of the Witwatersrand, Johannesburg*

15h00-15h30 Afternoon Refreshments

15h30-16h00 **Session Four**
The science behind batteries and battery materials of the future – what are the drivers?

What is driving battery technologies, what are boundary conditions? Focus on batteries for electromobility

Which are the major battery chemistries and which metals do they use? Focus on lithium-ion cathode active materials for electromobility (layered oxides, olivines, spinels, disordered rocksalts, ...)

Latest developments in emerging battery chemistries – sodium ion, solid state, metal sulphur, metal air etc.

Are these serious competitors to the more established batteries and what are the implications for the metals involved?

What further innovations in battery technologies can we expect in the near future?

Battery Energy Storage Systems: is the market driving demand for (certain) critical minerals and metals?

Andreas Fischer, Vice President, Batteries and Electrochemistry, BASF

16h00-17h10 **The little understood role of Manganese: Why is manganese so critical now and for the future?**

Why is manganese such an important metal? Which applications is it used for?
Where is manganese mined and who are the major mining companies in this space?
What are mining companies' plans to increase production given the anticipated increase in demand?
How are current logistical and energy challenges in South Africa impacting the industry and what are the implications for the security of future supply?
Can South Africa and others take advantage of current geopolitical concerns over China and increase its share of the manganese market?

Chair: Bernard Swanepoel

Anna Fleming, Project Manager, Benchmark Minerals

Louis Nel, CEO, Manganese Metal Company

Brad Rogers, MD & CEO, Jupiter Mines

André Joubert, Chief Executive, Ferrous Division, African Rainbow Minerals

17h10-17h15 **Closing remarks from the Chair**

17h15-18h30 **End of Conference and Drinks Reception**

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