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Tanzania: Mining's Socio-Economic Contribution
19th May 2009

Mbudya Room, SeaCliff Hotel, Dar es Salaam, Tanzania

Co-hosted by: Tanzania Chamber of Minerals and Energy (TCME)
and International Council on Mining and Metals (ICMM)

Seminar Report

Executive Summary

MINING IN TANZANIA – AT A WATERSHED

Mining in the country is at a very important watershed – the decisions made in the next few months could extend or halt the impressive progress of the sector since the last major reform of mineral policy in the late 1990s. This was the high level message from a Workshop held in Dar on May 19th and attended by senior representatives from 14 government agencies and the main mining companies, and informed by a number of independent international researchers and other authorities.¹

The Workshop clearly revealed a need for more analytically founded conversations in future, and was a first step in this direction.

The workshop learned that the first 5 year Development Plan presented to the National Assembly by Mwalimu Julius Nyerere in May 1964 had anticipated only a limited contribution of mining to Tanzania's development. This expectation had proved sadly prescient. In the 34 years following Independence, Tanzania's huge mineral resources lay mainly untouched and unavailable to contribute to the many national and local priorities that the country faced including a severe deficit in the balance of payments, health care, education, poverty alleviation, water supply etc. *But this is no longer the case!*

The more liberal and private-sector friendly policies pursued by governments since 1995 and for the mining sector from 1998 have produced a 9-year bonanza for the country. A number of large international mining companies have collectively invested a total of well over \$2 billion in the sector mainly in gold mining. According to recent UNCTAD data this has made Tanzania the largest non-oil recipient of foreign direct investment in Africa after South Africa: easily out-distancing Kenya. From being on a par with coffee and the other main traditional exports 9 years ago, gold now earns the country \$780 million per annum – 700% more foreign exchange than coffee. Although still an infant industry – several of the new mines such as Tulawaka and Buzwagi are less than 5 years old - it already contributes more than 3% to total national tax revenues (circa \$100 million per annum).

Figure 1 shows the typical levels of these various macro contributions of mining to national totals based on international experience.

The very rapid growth of this new industry has come at a price: tensions within the country and local communities around mining are huge and damaging. This was evident even within the Workshop. Some government officials claimed that mining companies were not doing enough in their local communities. The companies refuted this and gave examples of leading edge training and other social programs as well as offers of support to government that had been ignored.

The mining specialists noted that on the one hand the large companies need the fiscal stability that enables them to justify spending millions of dollars on new exploration with only a 2% to 4% chance of striking a commercial seam. Then they must spend many more million dollars on mine construction, on sustaining operations for up to 25 years, and then on environmentally and socially responsible mine closures: now a non-negotiable element of their total costs. The workshop learned that the planning horizons and the gestation periods associated with a typical mine and its payoffs are extremely long. The many uncertainties associated with these long gestation periods

¹ The workshop was organised by the Tanzanian Chamber of Minerals and Energy in conjunction with the International Council on Mining and Metals (ICMM). It was opened by the Chief Secretary, Mr Philemon Luhango, and closed by a speech by the Minister of Mines and Energy

generate large commercial risks for all major mining projects. Political and regulatory risks represent a potentially additional – but avoidable – risk factor that is bound to impact commercial investment decisions.

On the other hand it was noted that the nation generally and local communities in particular expect to see a broad and speedy set of economic and social benefits to justify the tapping of a precious national resource such as gold. When these benefits fail to materialise quickly, or employment is smaller than expected (see Figure 1) the result can be toxic: irritation on both sides, physical conflict in some cases and above all strong political pressures to find quick fixes to try to generate quicker gains for at least some stakeholders. The short time horizons of most governments will often intensify these pressures at the political level. Several of the workshop participants subscribed to the view that these short-term gains had to be achieved in greater measure! ICMM's extensive analysis of this problem internationally shows that Tanzania is by no means unique in facing these tensions.

Is the bonanza of the past 9 years likely to continue beyond 2009, what are the policies that can help to increase the likelihood of this, and can it survive the tensions just referred to?

The Workshop was greatly helped in answering these crucial questions by the leading contribution of Mr Ben Aryee who is the CEO of the Ghana Minerals Commission. He drew on his extensive knowledge of the much longer-established mining industry of Ghana – one major mine at Obuasi is more than 100 years old – to provide a broadly encouraging answer but also some important suggestions. He noted that Ghana since 1986 – when mineral policy was reformed - has benefited from a much stronger macro economic performance than before as mining has expanded even more than in Tanzania. Arguably mining's recovery has been the single most important element in Ghana's economy-wide recovery from a state of abject decline in the 1970s. At the same time those regions in Ghana that have the highest levels of mining activity have seen bigger reductions in absolute levels of poverty than have other regions where mining activity is not present. The government is also much further down the road than it is in Tanzania in developing policies to extend these positive outcomes to artisanal miners and others.

So a positive social and poverty benefit from mining is possible but, as pointed out by Mr Aryee, this has taken a considerable period of time – far more than the 9 years of life of the infant mining industry of Tanzania. This message was driven home by Kathryn McPhail the research director from the ICMM. She noted in particular that supportive government policies in Chile, together with public private partnerships over many years had used mining as the catalyst to generate very large **indirect** employment, income and investment benefits from mining. The so-called "mining clusters" in Antofagasta - Chile's core mining region – had helped to reduce poverty there by 60% in 14 years from 1990: faster than in any other region in Chile.

Further answers to the same critical questions were provided by Alan Roe an independent economist from Oxford Policy Management in the UK. Alan Roe reported on innovative new research for Tanzania which has utilised data for the four main operational mines and two other mines starting operations in 2009 or later. The companies had provided his team with forward looking "life cycle" data for all of these mines on all main aspects of their operations – capital investment, operational costs, employment, tax payments, community contributions etc. for all years from inception through 2034².

His results led to THREE key conclusions that together explain why mining in Tanzania is indeed at a watershed at the present time.

² The researchers have been told that this is the first time that such an analytical exercise for mining has been attempted for any country in the world – Tanzania is the pioneer!

First, in the next 6-10 years the data tell us that the identified mines alone are planning to greatly increase their levels of gold production and exports (by around 50-60% from 2007/08 levels). The data show also that the gradually emerging profitability of these mines is likely to greatly increase total mining tax payments to government (by almost 300% to around \$280 million per annum in about six years time), *even if there is no change in the tax rules*. The bulk of this revenue will come from the corporation tax with the 3% royalty proving to be merely the early stage source of most revenue. This operational scenario will result in Tanzania's economy having an even higher level of macroeconomic reliance on mining by 2014.

Second, these possible increases in mining's contributions to the macro economy will require the companies collectively to make further additional investments in their **existing** gold mines, estimated at \$2.3 billion in the period through 2034. These are the 'staying in business' costs³. Without such investments the prospective increases in production, exports and government revenue will not be achieved from the existing mines.

Third the existing mines alone cannot sustain the industry at its present levels in the longer term. The life cycle analysis clearly shows that the macro contributions of the identified mines will begin to decline from around 2018 and will fall sharply thereafter. So the conclusion is that significant new capacity will be needed to maintain the macro contributions of gold mining even at the levels already achieved by 2007/08. Specifically total output could fall to only about 500,000 oz by 2022. This is only half the output achieved by 2007/08 and only about one third of the output of over 1.4 million oz that the data suggest to be possible by 2014!

What are the implications?

This question was debated strenuously by the workshop participants. But the logic of Alan Roe's second and third main conclusions seemed to be inescapable. If Tanzania as a nation wishes to see an expanding macroeconomic role for mining and the maturing of the industry, then a great deal of new investment is called for in both *existing* and prospective *new* mines. Specifically to close the output gap that rapidly emerges after 2018, **2-3 mines as large as Geita will be needed** by that time. At present with exploration activity at a near standstill there is much doubt about whether this is likely in practice⁴. Few companies plan any major new investment while the future regulatory system remains uncertain.

Figure 2 illustrates the gap diagrammatically.

The regulatory and taxation regime when it is eventually reformed by the new Minerals Policy promised by the government since 2005 – and there was broad agreement of the need for this reform – must still provide a similarly stable and competitive environment as that in place since 1998. Failure in this respect is likely to result in a decline of mining's contribution in the manner indicated in Figure 2. At the moment there is great uncertainty and anxiety about this. However, in the Minister's closing speech he assured the workshop that *a competitive regime would indeed be sustained by the imminent reforms!*

A second main implication is that the crucial agenda to achieve larger social and community benefits from mining must be pursued in parallel with the other mineral reforms, and require government – particularly regional and district governments -, companies and local communities to work together for better outcomes. This can also fatten the base of the inverted pyramid shown in Figure 1 by creating indirect jobs and incomes in addition to the direct jobs made possible by the

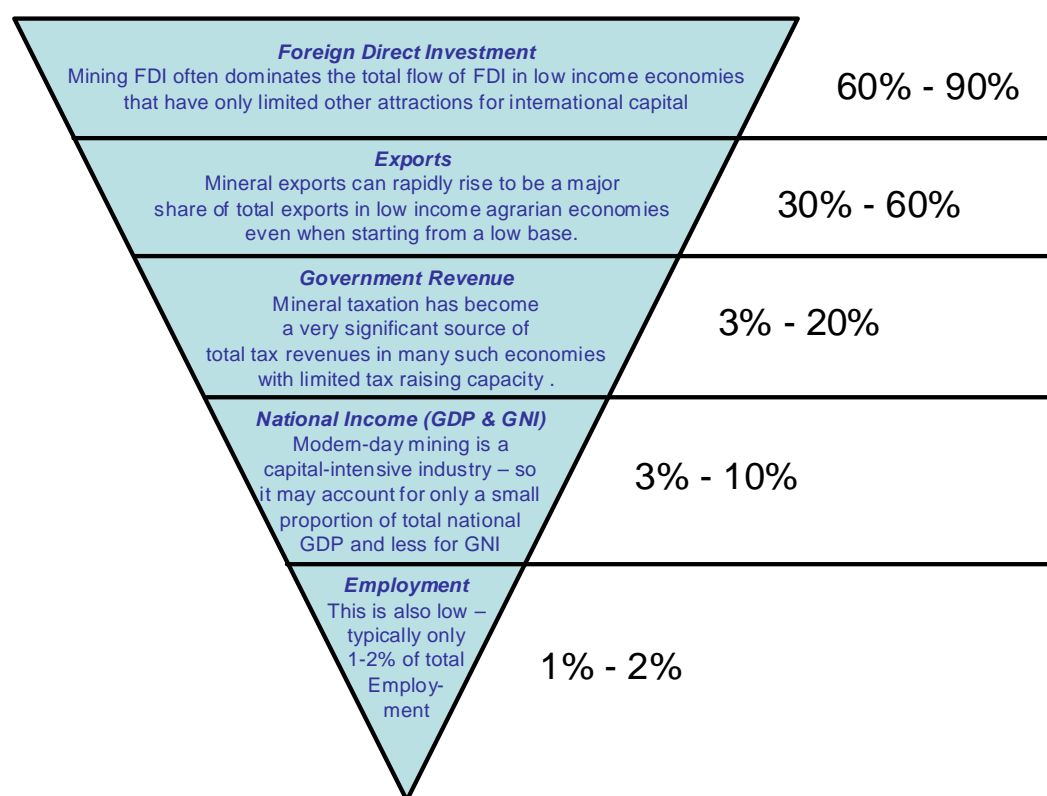
³ The technical realities of the life cycle as explained by Dr John Groom the Chairman of the ICMM's Resource Endowments Initiative - indicated that there are many break points in that cycle – decisions **not** to incur the extra capital cost would also reduced the expected level of future outputs and exports. These levels are definitely not fully pre-determined by decisions already made by 2009!

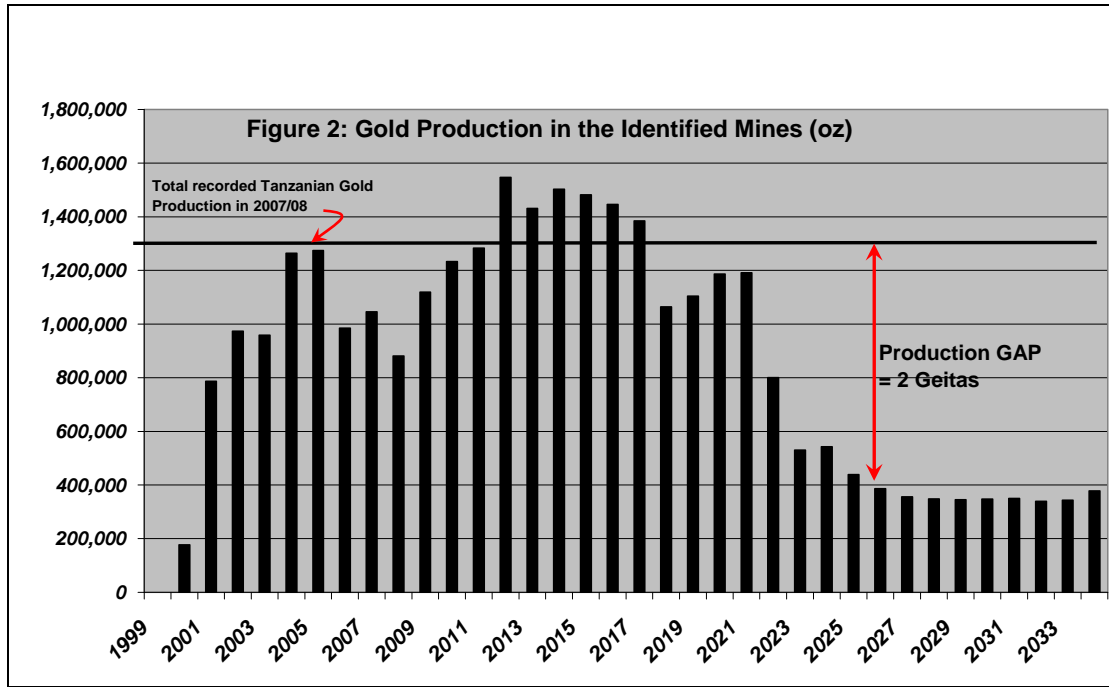
⁴ Given the long gestation lags the exploration for these new mines must be intensively pursued now.

mines. The workshop noted that Judge Bomani in his comprehensive recommendations of 2008 had made important suggestions about specific ways to do this. Unfortunately these had been over-shadowed by his recommendations on tax matters.

Building also on the partnership ideas from Ghana presented by Ben Aryee the participants broadly agreed that there is now a major agenda of work urgently needed to define the local economic development and other community partnership programmes that will help to ensure that the positive examples illustrated by international experience are replicated in Tanzania. If achieved successfully this will help to ensure a better social consensus around mining that will then make it far easier for the politicians to rally behind a competitive regime that will sustain the 9 years of success for a further period of time! Failure will re-awaken the experiences of the 1970s and the 1980s in which mining's contribution to the economic improvement of the Tanzanian people was negligible.

Figure 1: Mining's Typical Macroeconomic Contribution – the International Experience (shares of national totals)





Break-Out Discussion Groups

The seminar broke out into 4 groups to discuss the issues and opportunities for Tanzania across each aspect of the project lifecycle: Exploration, Construction, Operations/temporary closure and Closure. Each group consisted of governmental officials and mining company representatives. Feedback was presented to the other groups.

Group 1 - Exploration

Group 1 discussed the exploration process. Few opportunities were presented in this part of the project lifecycle by the group. Issues identified were:

- Exploration was a risky and complicated process (e.g. of 50 areas explored, only 1-2 are likely to be of production potential). Thus it was expensive. Licences are issued by the central government and local communities were not involved in the licensing agreement.
- There are few benefits beyond some casual employment, while often people (particularly ASM) are displaced and receive very little compensation in this process.
- Labour would be casual as there are no local experts for the technical positions and local displacement was acknowledged.

During open discussion with the rest of the seminar participants, it was acknowledged that the level of exploration is going down in Tanzania and a pressing question is how to promote exploration in the current global financial crisis? There are some opportunities to engage communities in the exploration process which is being done by one company in Tanzania.

Group 2 – Construction

Group 2 discussed the construction process. A number of issues were identified during construction: land acquisition, compensation, resettlement, regulatory issues, community participation, contractors (foreign and local), ‘tendering’, importation (of capital goods), labour (foreign and local), conflict resolution, infrastructure (utilities, roads, railways, ports, water, sanitation, housing, medical, communications, education and recreation), security and social issues as a result of an influx of people on an area.

The group considered the following to be opportunities created from the construction phase:

- Direct and indirect employment at a mine.
- The opening up of new businesses and trading around the mine area.
- Upgrading and developing the infrastructure and social amenities around the mine site as well as within.
- Developing skills of workers – this was deemed very important.
- Empowerment of women by giving them the opportunity to work as professionals.
- Poverty reduction benefits due to greater numbers of skilled salaried workers.
- Formalising the economy through providing legal working arrangements and contracts.

Threats included: inflationary pressures for the local communities; disruption of local cultures with the population influx; environmental degradation; conflict; HIV/Aids and communicable diseases.

Group 3 – Operations

Group 3 considered the issues and opportunities within the operations process. The group divided these into macro and micro level issues.

Under the *macro* level:

- Legislation was considered an issue, specifically, we need a new Fiscal policy, Mineral policy, a Mining Act.
- A non-existent compensation and resettlement policy was also a concern.
- Human resources, economic sustainability and infrastructure were issues.

The issues under the *micro* level were:

- Community expectations.
- Security.
- Integration of planning between mining and local communities.
- Small scale mining through encroachment and influx of miners, in addition to whether this activity should be legalised or not. .

The opportunities that were identified were: mining's potential to contribute to poverty reduction and the need to link to the government's poverty reduction strategy, employment, local procurement, collaboration with local manufacturers to support and supply the mining industry, better linkages between companies with schools to encourage school children to train for skills needed by the industry, developing a local industry and improving the quality and quantity of goods.

Group 4 – Mine Closure

Group 4 discussed mine closure. The group identified that the problematic issues that were presented could be reduced by changing them into opportunities. The issues were divided into 3 categories: economic, environmental and social.

Economic category:

- Planning is needed from the outset to form partnerships to allow for socio-economic transformation in people's lives through urbanisation, employment, developed skills, infrastructure (including social services) and utilities, and government revenue.
- Closure can also be a shock and sustaining a way of life after closure is an issue.

Environmental category:

- Backfilling the pits, although costly, can be done progressively. Replanting is also important and other benefits can be gained from fish farming, recreation activities. It was suggested that a closure bond was needed.

Social category:

- Unemployment problem and social dislocation as a result of mine closure.

It was suggested that a partnership between companies, government, non-governmental organisations and civil society organisations was considered to create these opportunities. Group 4 also concluded that planning was needed from the beginning.

A discussion regarding mine closure followed. It was suggested that people can be prepared for closure, especially when the life span is known. For abrupt closure, a bond is needed to aid addressing the consequences of an unplanned closure. It was also considered that the land of the closed mine site could be given to a national organisation to take responsibility and plan its use. Barrick explained their systems of closure which relate to economic costs and social closure which included employee compensation. This spurred discussion of having vocational schools in order to develop necessary skills for the mining industry. It was argued however, that many people who obtain these skills go overseas to work and do not wish to return.

General Discussion Minutes

Following the presentations of the CEO of the Ghana Minerals Commission, Ben Aryee, and the team leader for Oxford Policy Management, Alan Roe, the floor was opened for discussion.

Alan Roe was questioned on the graph showing gold and traditional commodity exports and was asked where the prices of the commodities being compared to gold had come from; it was established that the data was obtained from the Bank of Tanzania. It was also commented that disaggregated data for each individual mine would have been useful but Mr. Roe explained that these were only forecasts showing preliminary results for Tanzania and aggregated data had to be used to protect the commercial and legal standing of the companies. A further comment noted that companies are very transparent in posting their reports on their websites and are audited three times (internally, externally and by the Tanzania Revenue Authority), but for legal reasons could not provide public forecasts as it would be in contravention of the stock exchange rules that govern their reporting to the markets.

Ben Aryee was asked how Ghana was addressing the problem of illegal miners. Mr. Aryee responded that Ghana worked hard to encourage illegal miners to mine properly. District centres have been set up to encourage illegal operators to register and move to designated areas for small scale mining; with technical assistance programmes teaching the miners how to operate properly in order to reduce the health, safety and environmental impact of small scale mining. Mr. Aryee acknowledged, however, that a lack of land was a restriction for this initiative.

An open discussion began regarding the provision of services by the government and if these services were supplied by government, when would the companies be able to pay corporation tax? It was commented that mining companies often fund services that the government should be responsible for and thus as with other expenditures need to offset these against their tax bill. The companies argued that:

- Fuel to power the mines was their single largest cost and the sooner power costs could come down companies would be able to make more profits and pay more tax. However, power supplies from the national grid are generally unavailable or unreliable and this is therefore a huge cost that impacts upon their profits. The companies do everything possible to reduce costs as it increases their profits, and they want to invest in more cost effective power provision but stress they need the support of government to do this as it would involve a substantial amount of money.
- Transporting goods by railway is half the cost of roads but the failure of the railway system makes transporting goods difficult and more expensive, again reducing profits and taxes.
- Due to regulatory and tax barriers placed on local firms, it is often more expensive and time consuming for local entrepreneurs to provide the companies with supplies than it is for companies outside the country.

Government officials responded to this by stating that they are expecting extra power generation facilities to be built in the near future and this will therefore help with reducing the costs for mining activities. The companies clearly acknowledged that they are prepared to invest in power with the government and one investor explained that a project had already been proposed to the government which was rejected. A government official accepted to consider the proposal and said "We are ready for collaboration with the private sector". The situation in Ghana was discussed and noted that Ghana had previously had problems with power outages due to a drought since 60% of power is from hydroelectric sources. By working with the government the companies had invested in extra power capacity. In reference to the tax and regulatory issues that prevent local firms in Tanzania from supplying the mines, the experience of Ghana was to extend tax concessions that applied to mining to the local firms as this would lead to greater integration of the mine in the local economy and increased tax collection.

It was acknowledged that the level of collaboration between mining stakeholders, investors and government was a key issue. However, companies felt that the government were not responding to the initiatives that they already had in place. It was then suggested that the Chamber of Minerals and Energy (TCME) take a more active role in achieving the link between industry and government. TCME needs to push for communication between the players to move forward.

The government communicated their portrayal of the next steps:

- Through greater collaboration with the industry and more efforts to increase local economic linkages they were hopeful that the economy would benefit significantly.
- Government needs to provide certain necessities such as utilities (power and water) that the companies use. This would allow companies to operate efficiently and the government will receive greater tax revenues.
- The government knows the mines are contributing more than just the royalties paid. Government has been taking steps to improve its communications and companies need to follow suit. There should be radio and TV campaigns demonstrating the large contribution that the mining sector is making to the Tanzania economy and society.
- Expect companies to make every effort to procure goods from within Tanzania as the wider economy would benefit from greater integration with the mining sector.

In response, it was explained that companies do purchase goods locally wherever possible and that they use local agents when the products need to be bought from overseas. However, it was noted that it is often cheaper and easier to purchase goods from overseas as the level of local entrepreneurship and stability of local supplies was often lacking. Great efforts to increase local supplies from 4% to 70% were noted by one firm; but from others their experience of using local agents to source overseas products had been expensive and slow. Tanzanian entrepreneurship was said to be in an infant stage and because of the huge quantities of goods (often foodstuffs) required by the mines it is difficult to obtain a secure and steady supply of local goods.

A separate issue on the direct benefits that the government and locally affected people expect from the mining companies led to a discussion of the need for the companies to manage the expectations of communities as to what benefits they will receive from the mines. It was noted that communication by the mining industry (including companies and governments) needed to improve as local people were unaware of the mineral and energy sector's contribution to Tanzania despite a number of corporate social responsibility (CSR) projects. It was recommended that companies should communicate with local people around the mines through frequent interactions with communities.

The discussion moved on to mining policy. The mining policy had been under review since 2005 and the industry felt the review had been dragged on for too long and this long period of instability had led them to delay making crucial decisions about investment until the future was clearer. It was argued that the issue of artisanal small scale mining (ASM) would not be a problem if the government actually enforced their own policies and needed to stop acting 'soft' on illegal mining for political reasons. A government representative noted it is harder for them to enforce the law before elections and that most small scale miners wanted to operate legally but the few other economic opportunities available to them forced them to operate illegally. In summing up, it was noted the TCME should take the lead and meetings like this should be encouraged. There needs to be a constructive dialogue between government and companies to address the issues of enforcing the law governing ASM activities and in providing the infrastructure where needed by the mines and surrounding communities to increase economic opportunities.

Closing Comments

The seminar was closed by Mr Ngeleja, Minister of Energy and Minerals. He acknowledged that other African countries had taken time to develop their mineral sectors and Tanzania was in a similar position making reference to the long term future of mining in the country. Mr. Ngeleja proceeded to comment that the government strives to improve policy and legislation in order for Tanzania to be attractive to mining investment. It was also recognised that involvement and consultation with key stakeholders was important within the mining process. A vote of thanks was then given to TCME and ICMM for organising the seminar.

Gareth Taylor, TCME Chairman, admitted that he will not leave the seminar with a positive view. He criticised that there was a lack of discussion based on the presentations. However, he was thankful for the advice from the government regarding what steps mining companies can take to further smooth operations. From a Barrick viewpoint, Mr. Taylor stressed that Tanzania was a difficult country to do business in and that changes needed to be made to avoid these difficulties. He stated that Barrick will only continue to invest if the returns are there. It was suggested that a situation needs to be reached where investors, government and communities are all in a favourable position. An offer that the TCME will propose the next step was made. He concluded by a vote of thanks to the organisers and to those that attended.

Summary of the Evaluation Findings

Feedback forms were issued at the end of the day requesting comments on aspects of the seminar that worked well, what could be improved and lessons or insights that the participants will take away with them from the day. Out of 34 participants (excluding staff from ICMM, TCME, OPM and the facilitator), 19 feedback forms were returned.

The general feedback from the seminar was positive. The organisation, facilitation and general set up of the seminar were acknowledged. Participants commented that there was a broad and senior representation from government and companies. The group discussions and presentations were seen as useful and informative. It was also mentioned that there was good interaction and exchange between participants, and all attendees were encouraged to participate.

Most comments on improving the seminar were based on the timings and having a 2 day seminar was suggested. Others included: involving other stakeholders (such as small scale miners), having a brief presentation from local authority/government, having a presentation from the local mining industry, seeing more case studies from African countries and disaggregating the data that was presented.

The feedback forms suggest that a number of lessons were learned from the session. The table below divides the insights into government and companies so that the comments are in context. Some comments have been integrated where similar.

Government Participants	Company Participants
<ul style="list-style-type: none"> • Exchange of ideas and information • Experience of Ghana is highly appreciated: <ul style="list-style-type: none"> • Showed that mining industry can contribute benefits to the economy and that this should be done through collaboration with all stakeholders' 	<ul style="list-style-type: none"> • Need for cross stakeholder discussion and partnership/collaboration amongst players, investors, government, communities and community based organisations • Transparency required • Communication by sector to public to be enhanced

<ul style="list-style-type: none"> • Showed the real challenges that Tanzania need to consider • Companies have a major role and can contribute to the economy • There is a need to have more frequent forum/consultation process between the mining sector and policy makers • The plight of investors – to be provided with economic services • Importance of strengthening forward and backward linkages for poverty reduction • Enhancement of partnership between the government and mining companies – this is needed to improve the sector • Tanzania can improve in terms of opportunities to be obtained from the mining industry • Tanzania needs to change legislation to enable potential use of resources and obtain more revenue. • Tanzanian officials are beginning to realise the active role that they will have to play to ensure the country's sustainable development 	<ul style="list-style-type: none"> • Social services such as infrastructure and enabling local entrepreneurs as the role of the government • Issue of illegal miners is complicated even in countries like Ghana • Government does not have a long term view and mining is long term • More discussion, education and understanding is required
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An anonymous feedback form stated that there should be a more active role in communication, research and analysis by the Chamber.

As a follow up to the seminar, Kathryn McPhail and Alan Roe visited the Tanzania Revenue Authority during the same week. They gave a presentation to 20 senior staff which was followed by extensive discussions.

In addition, there has been some direct contact from government officials who did not attend the seminar. The communication was made regarding interest in the presentations and their content, in particular Alan Roe's. Specifically, one enquiry was made relating to the Bomani Commission from an MP and another inquiry associated to a study by the Planning Commission. These engagements are a positive sign that the content of the seminar has been communicated to others by participants, who subsequently have taken an interest and initiative to follow up.

Agenda

Facilitator: Professor Kapepwa Tambila

Morning Session

8:30	Light refreshments served	
8:45	Welcome, Objectives, Principles of Participation Opening Speech by Chief Secretary	Mr. Phillemon (Chief Secretary) Ami Mpungwe (Chairman) John Groom (Chair of Resource Endowment Working Group)
9:05	Opening Circle: (1) Introductions (2) What is your experience with mining and what is your sense of the contribution of mining in Tanzania?	Prof Kapepwa Tambila (University of Dar es Salaam)
9:50	Mining – An Overview (1) The Mine Project Life Cycle (2) Inputs and Outputs – What are the costs, benefits, risks and responsibilities?	Dr. John Groom
10:15	Tanzania Country Case Study Overview	Kathryn McPhail (ICMM – Senior Program Director)

Refreshment Break

10:40	Issues and Opportunities for Tanzania 1 What are the issues and opportunities for Tanzania across each part of the project life cycle? (1) Exploration (2) Construction (3) Operations/temporary closure (4) Closure	Small Groups
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11:30	Small Group Report-outs and discussion	All
12:00	Lunch	
<u>Afternoon Session</u>		
12:45	Experience from Ghana	Ben Aryee (CEO Minerals Commission of Ghana)
1:30	Discussion	All
2:00	Gold Mining in Tanzania, Preliminary Life Cycle Analysis	Alan Roe (OPM Consultant)
2:45	Discussion	All
3:30	Issues and Opportunities for Tanzania 2	Small Groups
	What are the next steps required to ensure a fair relationship between mining and Tanzania?	
4:15	Small Group Report-outs and discussion	All
4:30	Closing Circle	All
	(1) What aspects of this meeting worked well?	
	(2) What could be improved next time and how?	
	(3) What are the two most important insights that you take away from this meeting?	
5:00	Summary and Close Closing Speech by Mr. Ngeleja	Mr. Ngeleja (Minister Energy & Minerals) Gareth Taylor (TCME Vice Chairman)

Participation

Government officials from various ministries and the President's and Prime Minister's offices attended the seminar. Representatives from mining companies in Tanzania were also present. The list below shows those that participated.

Organisation	Post	Name
President's Office	Chief Secretary	Mr. Phillemon Luhanjo
	Cabinet Under Secretary – State House (Economic Affairs)	Mr. Prosper Mbena
	Economic Adviser to President, State House	Dr. H.H. Mwinyimvua
	Cabinet Assistant Secretary – State House	Sihaba Nkinga
	Coordinator, Office of the Chief Secretary – State House	Mr. Francis Mwaipaja
Prime Minister's Office	Deputy Permanent Secretary	Fanuel E. Mbonde
	Assistant Director – Sectoral Ministries, Coordination of Government Business	Mgeni S. Baruani
	Regional Administration and Local Government – Assistant Director – Legal Services	K.M. Luanda
Ministry of Finance and Economic Affairs		Anna Mbelwa
Tanzania Revenue Authority	Commissioner of Large Taxpayers Department	Mr. Patrick Kassera
Ministry of Agriculture	Principal Economist	Mr. Julius Zedekiah
		Margaret Ndaba
Ministry of Energy and Minerals	Commissioner of Minerals	Dr. Peter D. Kafumu
	Assistant Commissioner Small Scale Mining	Mr. Alex Magayane
	Director of Policy and Planning Ag. Permanent Secretary	Invocavit Humphrey Swai
Ministry of Community Development, Gender and Children	Community Development Officer	Sophia Mwenda
Ministry of Industry Trade & Marketing		Margaret Ikongwe
Ministry of Infrastructure	Permanent Secretary	Eng. Omar A. Chambo
Ministry of Health and Social Welfare		Elias Chinamo

Ministry of Lands		Joseph Stanley
Planning Commission	Executive Director, Tanzania Investment Centre	Emmanuel Ole Naiko
	Assistant Director Private Sector	Mr. Erick Kirumba
Ministry of Water and Irrigation		Gibson Kisalia
Bank of Tanzania		Geofrey Nangali
Minerals Commission of Ghana	CEO	Benjamin Aryee
TCME	Barrick Gold	Deo Mwanyika
	Barrick Gold	Philbert Rweyemamu
	Barrick Gold	Gareth Taylor
	Executive Secretary	Emmanuel Jengo
	Technical Officer	Tina Mwashu
	Chairman TCME	Ami Mpungwe
	Resolute Limited	Don McLeod
	Resolute Limited	Gerald Mturi
	AnglogoldAshanti	Hatibu Senkoro
	IAMGOLD	Anna Haule
	Geita Gold Limited	Clement Msalangi
	Geita Gold Limited	H K Senkoro
ICMM	Senior Program Director	Kathryn McPhail
ICMM	REI Chair	John Groom
ICMM	Program Officer (Rapporteur)	Gemma Lee
OPM	Consultant	Alan Roe
OPM	Consultant (Rapporteur)	Mark Essex
UNIV. OF DSM	Facilitator	Prof. Kapepwa Tambila