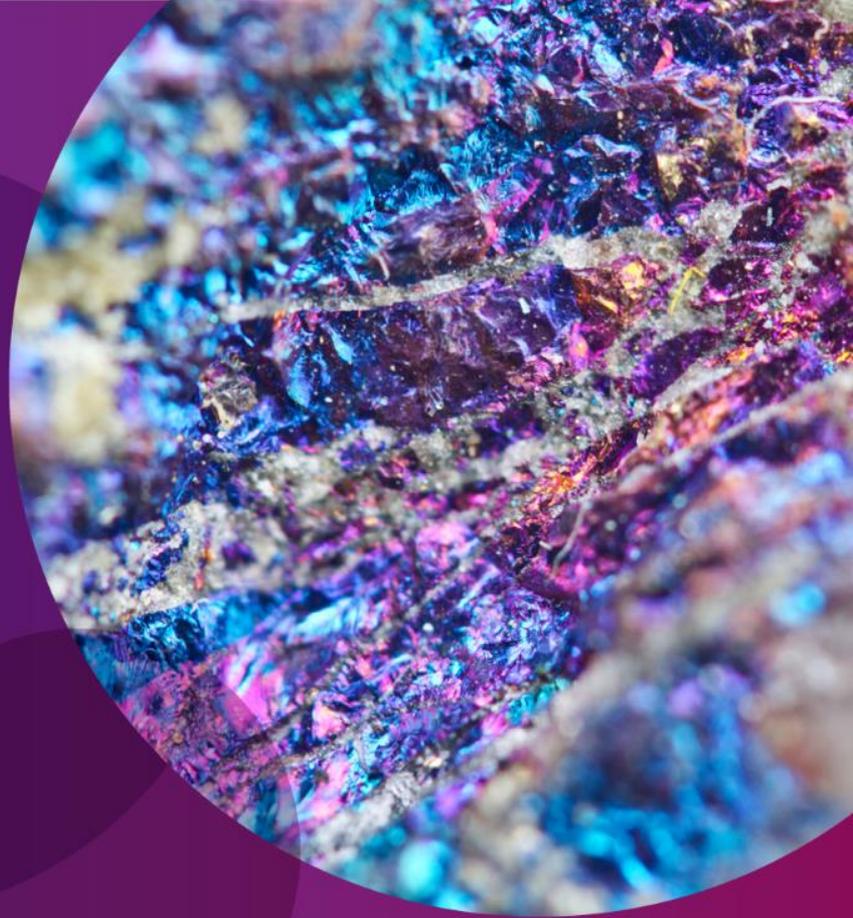


大成 DENTONS

Global trends in mining – The latest insights from Africa, China, Canada and Latin America

Monday, March 22, 2021 / 12-1 p.m. ET

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THE LATEST TRENDS IN GLOBAL MINING
A WEBINAR SERIES



Meet our presenters



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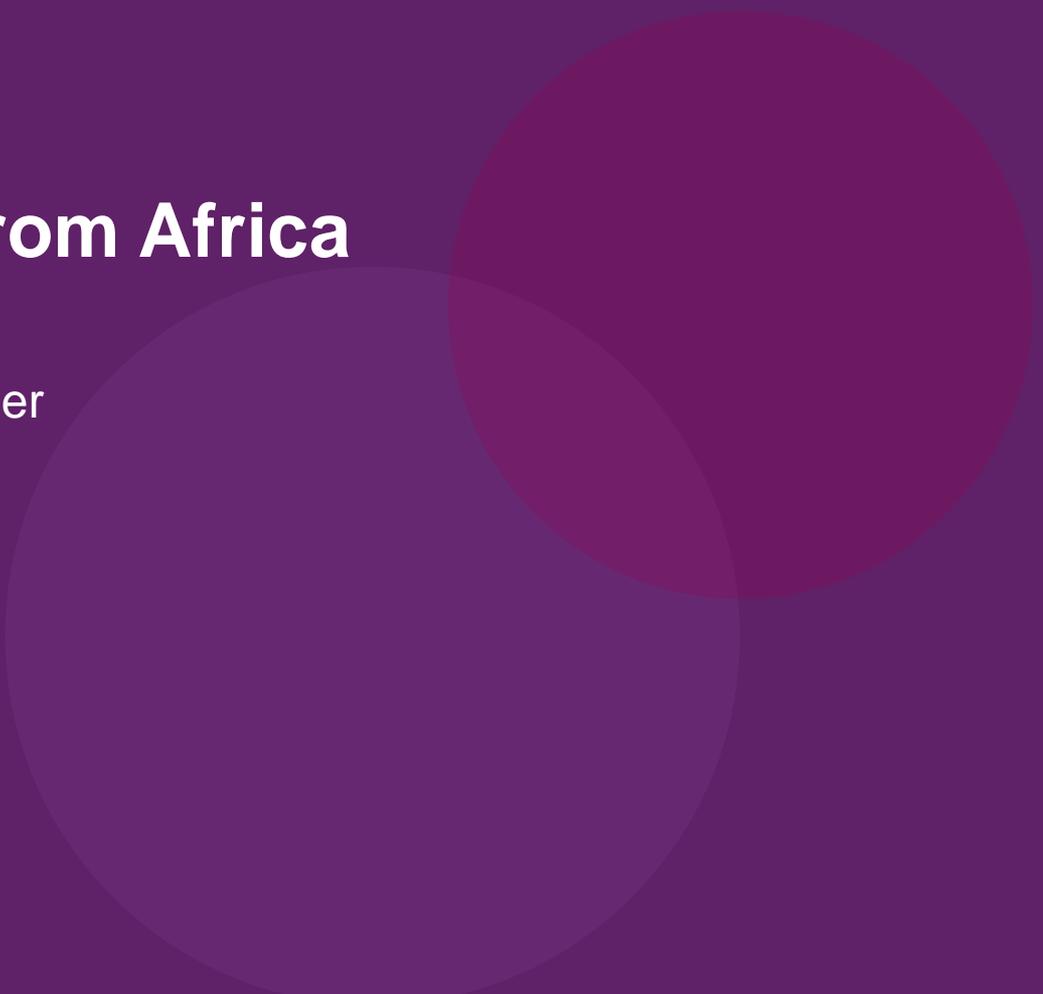
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Perspective from Africa



Brandon Irsigler, Partner

Zambia

- New gold rush?
- Cautionary tales: Konkola Copper Mines (**KCM**) and Mopani but: new opportunities
- Royalty tax deductibility – effective rate of tax for miners?
- Sovereign debt

Zimbabwe

- Opportunities v realities

Namibia

- Overlooked jurisdiction
- Key minerals and stability
- Tax and royalties

South Africa

- Will we ever get it right?
- Green shoots?
- Market snap-shot - winners and losers

Perspective from China

Year of the Ox – Bullish for China mining?

Wei Shao, Partner

The perspective and mindset of mining executives and decision makers in China

- The variables and the constant
- Tightened foreign investment and national security review in western countries
- Pandemic and economic slowdown
- From “money is not an issue” to risk averse
- In need of more success stories

Major players, but not major moves

- The leading and the fading
- What separate the leaders from the rest

Lessons from One Belt One Road ambition and execution

- Strategy and execution
- Ambition v. reality
- Follow or ignore traffic lights

What to expect from China's mining law revamping



Perspective from Canada

Ikram Al Mouaswas
Advisory Partner, Deloitte

Deloitte's tracking the trends 2021: Closing the trust deficit

Closing the trust deficit

Three trust deficit trends we see in the mining industry

- **Investor trust** – M&A in an altered world
- **Social trust** – linking social investments to sustainable outcomes
- **Workforce trust** – future of work, redefining leadership, adapting the culture

*Mining companies have acknowledged for the second year in a row that their **trust deficit** with affected communities, the lack of a 'social license to operate, is their number-one risk. – World Economic Forum, July 2020*



Perspective from Latin America

Fernando Pickmann, Partner

Mining in Latin America

- Current situation creates opportunities for mining business
- Mining will be a key component for economic recovery in many jurisdictions
- Legal systems seek to promote the exploitation of mining resources
- Increase in ESG considerations
- Rising prices in gold (all time high) and copper (seven year high)
- Specific interest in lithium deposits- especially in Chile – to cover growing interest in battery generated power
- Technological innovation

Thank you

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