



## IMnI 39th Annual Conference

### SESSION CHAIRS' BIOS

#### Alastair Stalker



Past Chairman of the IMnI (2007-2010), Alastair Stalker was born and educated in Scotland (attaining a B.Sc (Hons) Geology) and in 1972 emigrated to Africa where he worked as an exploration geologist for various companies for 14 years. After completing a postgraduate degree at the University of the Witwatersrand in 1985, he worked in strategic planning, evaluation / project management and marketing for Shell's Mineral Division.

He has worked for Ore & Metal Company Ltd for the past 17 years and is now the Managing Director, responsible for the marketing, sales and logistics of Assmang's manganese ore and alloys, ferrochrome, chrome ore and iron ore. He is also an Assmang director and a member of that company's Excom.

#### Pedro Larrea



Pedro Larrea joined Grupo FerroAtlántica in 2011 as CEO of the company. In December 2012 he was also appointed Chairman.

Pedro holds an MBA from INSEAD, where he graduated with honours. He graduated as a mining engineer (MSc equivalent) from the Universidad Politécnica of Madrid, specialising in energy and fuels.

He has spent most of his professional life in the energy sector, holding relevant positions both in the industry and in professional services firms, where he has acquired a wide experience in processes optimization, managing of international companies and analysis, negotiation and execution of mergers and acquisitions. He is also expert in the regulation and planning of the energy industry.

The most relevant positions Pedro Larrea has held include:

- 13 years in ENDESA (biggest Spanish power company and one of the most important multinationals in the sector) where he reached the CEO position in Endesa Latinamerica.
- PwC, where he was the leader of the Energy practice in the consulting division.
- McKinsey & Company, in the Madrid and Los Angeles offices.

#### Peter Toth



Peter Toth is the Group CEO of OM Holdings Ltd, an ASX listed manganese producer since September 2008. After a period of working and studying in Japan, Mr Toth has joined BHP in Australia where he held various junior management roles with BHP Steel and BHP Manganese.

Following the sale of BHP's Manganese division in 1998 to Billiton he joined Samancor Manganese and held senior marketing roles in Australia and The Netherlands.

Following the BHP and Billiton merger in 2001 he moved to Singapore as Vice President for Manganese Marketing and later took on the role of Vice President for Iron Ore Marketing.

# I n t e r n a t i o n a l M a n g a n e s e I n s t i t u t e

In 2006, he took responsibility for managing the combined marketing and logistics activities of BHP Billiton's Carbon Steel Materials group as Marketing Director. Mr Toth holds a Bachelor of Business degree from Monash University, a Graduate Certificate from Deakin University and a Master of International Business from the University of Melbourne.



## IMnI 39th Annual Conference

Wednesday, June 5, 2013

Session 1

### Anti-Trust Presentation

Robert Paul, Senior Partner, White & Case LLP



Robert Paul, a Senior Retired Partner at the global law firm of White & Case, has been advising US and multinational trade associations for over 40 years.

He received his Bachelor of Laws degree from Harvard Law School and a Master of Laws in Trade Regulation from New York University. Following law school he became a trial attorney with the US Department of Justice Antitrust Division in Washington, DC. He then left the Antitrust Division to develop the antitrust department of the largest law firm in Boston.

In 1985 he was requested by President Reagan to move to Washington, DC and become General Counsel of the United States Federal Trade Commission. Despite his law partners' objections, he accepted.

In 1989 he was awarded the FTC's Official Commendation for Distinguished Service, having supervised 15 FTC appellate briefs and arguments to US federal courts.

He then returned to private law practice and in 1995 joined White & Case to head the law firm's antitrust department where it grew to over 100 lawyers worldwide. Today he represents multiple national and global trade associations, including the Worldsteel Association and the International Stainless Steel Forum

### Alex Puissant



We want this conference to be as interactive as possible and that's why we've hired a professional conference facilitator.

Alex Puissant is a television journalist. For many years, he covered European Union Affairs from Brussels, which also happens to be his home town.

He is a graduate of Columbia University in New York and now he's based in Rome (Italy), where he followed his wife.

He has moderated more than 500 international conferences, in seven languages, for organizations ranging from leading multinationals to the United Nations. He handled speakers as diverse as Vaclav Havel, Bill Gates and Margaret Thatcher.

His name is Alex Puissant.

We have asked him to make sure the sessions run smoothly.

So, Alex, up to you.



Born in 1943, Asaf Savas Akat received his B.A in Economics from Istanbul University, M.A. from the University of East Anglia and Ph.D. from Istanbul University. He spent one year as research student at the London School of Economics.

A.S.Akat started his academic career at the Faculty of Economics of Istanbul University, becoming assistant professor in 1969, associate professor in 1973 and full professor in 1980. In 1996 he co-founded Istanbul Bilgi University, one of the pioneers of private universities in Turkey, and become its first rector. Currently he is teaching economics at Bilgi University.

A.S.Akat had to discontinue his academic career in 1982 due to politics after the military takeover in Turkey. Until 1992 he worked in private industry, first as advisor, then as executive, taking part in the realisation of major projects in real estate (Sheraton Hotel and Karum Shopping Center in Ankara), computers (Commodore), cell phones (Turkcell). During this period he also served as chairman of the local subsidiary of the french insurance company UAP (Imtaş) and became board member of a large domestic conglomerate (Eczacabaci Holding), a post he still holds.

A.S.Akat was indirectly involved with politics throughout most of his adult life but had only a brief direct experience. In 1993 he co-founded a reformist-liberal political party, called New Democracy Movement (YDH), which disappeared after a dismal performance in the 1995 elections. He has always been active in many NGOs mainly related to education and in think-tanks.

In 1994 he started writing twice weekly columns on economic issues in the daily Sabah newspaper and later in the weekly Para. Currently he has a thrice weekly column in the daily Vatan newspaper. After 1999, he co-hosted with two other economists a weekly show on the economy, called "Ekodiyalog" at the local news channel NTV. The program was a success and lasted 10 years.

A.S.Akat written several books and articles; as well as a large number of conferences, speeches, interviews on media, etc. He was awarded several prizes for his work.

A.S.Akat is married to Professor Nilufer Gole, professor of sociology at the Ecole des Hautes Etudes en Sciences Sociales in Paris.



Robert Yuksel YILDIRIM is the President of ETI KROM Inc., subsidiary of YILDIRIM Group in Istanbul, Turkey. YILDIRIM Group ([www.yildirimgroup.com](http://www.yildirimgroup.com)) has been actively engaged in chrome ore mining and trading, ferrochrome production and trading, coal and coke trading, fertilizer production and trading, steel trading, logistics, shipping (chartering, ship owning), shipbuilding, port operations and management, energy and private equity. ETI KROM Inc. is the world's largest producer of "High Grade" Hard Lumpy Chrome Ore as well as the only HC FeCr producer of Turkey. YILDIRIM Group acquired Europe's one & only HC FeCr producing company, Sweden's "Vargön Alloys AB", in 2008. With this acquisition, YILDIRIM Group became the world's 2<sup>nd</sup> largest producer of HC FeCr with Low Si, P, and Ti.

Robert Yuksel YILDIRIM was awarded his Bachelor's (B.S.) and Master's (M.S.) degrees in Mechanical Engineering from Istanbul Technical University (1983) and Oregon State University (1989), respectively. Previous to YILDIRIM Group, he worked for over 4 years at Paceco Corp. in California, USA, as a design and project engineer for container handling equipment and gantry cranes.

He is currently the President & CEO of YILDIRIM Group and is fully responsible for international trade activities, financing of trade and projects, and investing in new projects (container terminal and ports, shipping and M&A deals, etc.).

# International Manganese Institute

How Are the CIVET's doing? And Who's New in the Zoo"

Robert Ward, Country Publishing Director  
Economist Intelligence Unit (EIU)



Robert Ward is the Economist Intelligence Unit's Country Publishing Director. In this role he leads the Country Analysis team, which boasts than 100 country and industry analysts. In this role, Robert helps to shape the company's response to changing economic and political trends.

Robert has also been spearheading the Economist Intelligence Unit's strategy for China, notably the launch of the new Access China product, which features detailed forecasts for 31 Chinese provinces and nearly 300 Chinese cities. He also plays a core role in communicating the company's forecasts and views to clients and other high-level audiences around the world.

Before taking up this role, Robert was the Economist Intelligence Unit's Global Forecasting Director. In this capacity he led the company's flagship Global Forecasting Service (now available for free on registration at [www.gfs.eiu.com](http://www.gfs.eiu.com)) on the outlook for the world economy. Prior to this role, Robert was a senior member of the Economist Intelligence Unit's Asia team with special responsibility for Japan, the Koreas and regional issues.

Wrap-up

Peter Toth, IMnI Chairman, CEO OM Holdings

\*\*\*\*\* *TEA BREAK* \*\*\*\*\*



## IMnI 39th Annual Conference

Wednesday, June 5, 2013

Session 2

The Future of the Global Steel Industry with a Focus on Turkey & The Middle East

Dr Nae Hee Han  
Worldsteel



Nae Hee Han is Director, Economic Affairs and Chief Economist of the World Steel Association (worldsteel). She is also Chief Representative of worldsteel's Beijing Office. She joined worldsteel in January of 2006. Before joining IISI, she worked for POSCO Research Institute for 15 years, where her last position was Director of China Study Center. During her years at POSCO Research Institute, she assumed diverse responsibilities in the areas of economic forecasting, international trade affairs, marketing and China studies.

She received a Bachelor of Art Degree in English from Hankuk University of Foreign Studies in Seoul and a Ph.D. Degree in Economics from Pennsylvania State University.

She also got a Master's degree in Business Administration from Aju University in Seoul.

She is a citizen of Republic of Korea and currently lives in Beijing.

An Outlook on the Indian Steel Industry

M. Dileep Raj Singh Chaudhary, Secretary  
Ministry of Steel, Government of India



Mr. D.R.S. Chaudhary, is a member of Indian Administrative Service of 1977 batch. Presently, he is holding the position of Secretary, Ministry of Steel, Government of India. Ministry of Steel is responsible for facilitating the growth of Indian Iron and Steel Industry and for the development of other essential inputs such as iron ore, limestone, dolomite, manganese ore, chrome ore, ferro alloys and sponge iron. Ministry of Steel is the administrative ministry for giant Public Sector Companies like Steel Authority of India Limited (SAIL), largest producer of steel in India and NMDC, largest producer of iron ore in India, RINL, MOIL and a few other companies. Ministry of Steel formulates policy relating to production, distribution, pricing of iron and steel and ferro alloys in India and also provides a platform for interaction of all producers and consumers of

steel in the country.

Prior to joining Ministry of Steel, Mr. Chaudhary was holding the position of Secretary, Department of Public Enterprise (DPE), Ministry of Heavy Industry and Public Enterprises, Government of India. DPE is the nodal agency for more than 250 Central Public Sector Enterprises and lays down policy guidelines on a variety of areas such as human resource management, Corporate Social Responsibility, Corporate Governance, Sustainable Development, etc.

Mr. Chaudhary was posted as Special Secretary in the Ministry of Home Affairs, Government of India. He has held senior positions in various Ministries and Departments such as Department of Industrial Policy and Promotion, Department of Heavy Industry, Department of Economic Affairs, etc. For a brief tenure, he was the Consultant to the Asian Development Bank.

Mr. Chaudhary has vast experience in finance and industry. He is interested in people, land management and eco-system preservation. He is an avid birdwatcher and a trekker. He adores nature.

# International Manganese Institute

The Chinese Economy and the Commodities Market

Jia Lianqun, Vice President & Chief Analyst  
MySteel



LiangQun Jia is currently Vice President and Chief Analyst at Mysteel. Mysteel is the largest steel websites ([www.mysteel.com](http://www.mysteel.com), [www.mysteel.net](http://www.mysteel.net)) in China and specializing in whole steel value chain studies, including iron ore, coal, ferroalloy, steel production, as well as downstream industries. Mr. Jia holds a Masters Degree from Peking University, He has almost 25 years of experience in the steel industry, with extensive knowledge of the global and domestic steel industry evolution, market trends, and competitive landscape. Mr. Jia was nominated as committee member of the China Iron and Steel Association (CISA), He has been invited as a guest speaker and delivered keynote speeches on large international steel conferences for many times at home and abroad.

India – What to Expect

Mohan Khanna, Chairman cum Managing Director  
Sagacious Financial Services



Mr Khanna is a commerce graduate, an Associate member of Institute of Chartered Accounts of India, an Associate Member of Institute of Company Secretaries of India and a cost Accountant. He has been associated with capital markets for nearly 3 decades. He served as CEO of two regional Stock Exchanges (Ludhiana and Baroda SE 1983-94) in India and was a member of Board of NSE, the largest Premier Stock Exchange in India and several Sub committees at the NSE, SEBI, the BSE and the Chairman of Financial services Sub Committee of FICCI. He was co-chairman of Indo-French JBC.

Mr Khanna was CEO at two leading I-Banking companies - UTI Securities and BNP Paribas Equities (1994-2001). He has handled variety of I-Banking and broking products including Private Equity placements, M&A, IPOs, Debt syndication and privatizations, research driven Institutional broking etc. He brings with him large and extended network of relationships with corporates, financial institutions, security industry players, MFs, FII's & Private Equity funds.

He started his entrepreneurial journey since 2001 by promoting a boutique I-Banking firm. His current role as CMD of Sagacious Financial services (P) Ltd is focussed upon mid-size companies is 'Pvt equity syndication and Mergers & Acquisitions'.

The EU Economy and Its Impact on Mn Alloy Demand & Supply

Alexandr Andreev  
Head of Ferro-Alloys Department  
Metal Expert



Alexandr Andreev joined Metal Expert in 2009 to take up the position of Global Steel Market specialist, and in 2 months has been appointed as the Global Steel market analyst. From 2011 Alexandr took a position of Global Ferroalloys markets analyst, and was providing the world ferroalloys markets monitoring and analysis.

Since January 2012 Alexandr is the Head of Ferroalloys Department. Under the leadership of Alexandr the new Metal Expert European bulk ferroalloys monthly product has been launched. Also he takes part in the organization of Metal Expert's International European Bulk ferroalloys conference.

Alexandr Andreev holds a Master of International Economy degree of Pridneprovsk State Academy of Civil Engineering and Architecture (2009, Dnepropetrovsk, Ukraine).

# International Manganese Institute

Wrap-up  
Alastair Stalker, Managing Director, Ore & Metal  
Former IMni Chairman

\*\*\*\*\**LUNCH IN MIYAKO RESTAURANT*\*\*\*\*\*  
*SPONSORED BY NIPPON DENKO JAPAN*  
*(they are not willing to make any speech)*



## IMnI 39th Annual Conference

Thursday, June 6, 2013

Session 1

### Projects

Sarawak, Malaysia	Peter Toth
Borwa Mine, RSA	Finn Behnken
Kudumane Manganese Resources, RSA	Sechaba Letaba
Coega Port Manganese Terminal	Cleopatra Shicekan
There actually is Mn ore in Turkey	Tan Wuji

#### Sarawak, Malaysia

Peter Toth



Peter Toth is the Group CEO of OM Holdings Ltd, an ASX listed manganese producer since September 2008. After a period of working and studying in Japan, Mr Toth has joined BHP in Australia where he held various junior management roles with BHP Steel and BHP Manganese. Following the sale of BHP's Manganese division in 1998 to Billiton he joined Samancor Manganese and held senior marketing roles in Australia and The Netherlands.

Following the BHP and Billiton merger in 2001 he moved to Singapore as Vice President for Manganese Marketing and later took on the role of Vice President for Iron Ore Marketing. In 2006, he took responsibility for managing the combined marketing and logistics activities of BHP Billiton's Carbon Steel Materials group as Marketing Director. Mr Toth holds a Bachelor of Business degree from Monash University, a Graduate Certificate from Deakin University and a Master of International Business from the University of Melbourne.

#### Borwa Mine, RSA

Finn Behnken



Finn Behnken graduated as a mining engineer from the University of the Witwatersrand in South Africa having worked in coal and gold mining. He furthered his career by working over 10 years in banking covering areas such as corporate finance, mining related private equity and project finance.

Mr Behnken has had wide ranging interaction with small and mid-size listed mining companies and their projects across the commodity spectrum and has evaluated many international projects from an investment and financing perspective.

# International Manganese Institute

In 2007 Finn joined Pallinghurst a specialist resources investment vehicle, whereafter he was soon appointed as a director as Tshipi é Ntle Manganese Mining (Pty) Ltd and tasked with managing the shareholders interests. In late 2011 Finn was appointed as the CEO of Tshipi and has led Tshipi Borwa mine's development from exploration drilling into production.

## Kudumane Manganese Resources

Sechaba Letaba



Sechaba Letaba is the CEO of Kudumane Manganese Resources, a green field project near Hotazel in the Northern Cape, South Africa. He has just overseen the completion of a Bulk Sample project and the commencement of the mining project for Kudumane.

Mr Letaba started out as a miner, working the rock face beneath the surface for the De Beers Diamond Mines in Kimberley in 1988. Throughout the 1990s, he worked his way steadily up the higher echelons of Mine Management.

In 2008 Mr Letaba was appointed as a Senior General Manager at Assmang's Black Rock manganese mining operations in Kuruman.

He studied BTech in Mining Engineering, National Higher Diploma and National Diploma in Metal Mining through the University of Johannesburg. He holds a Government Mine Managers Certificate of competency, an advance Diploma in Project Management and later completed the Executive Development Programme through the Gordon Institute of Business Studies (GIBS).

He has extensive experience in the regulatory requirements for the mines by the Department of Minerals and Energy, the day to day operations on a mine, as well as the overall management of a mine. His main expertise is in the mechanised mining systems.

## Coega Port Mn Terminal

Cleopatra Shiceka



Cleopatra is currently the General Manager in the Chief Executive's Office of Transnet Freight Rail. Prior to this position she was the General Counsel of Transnet Freight Rail, her areas of responsibility included legal services, compliance and governance, private sector partnerships and specialised finance projects.

Cleopatra has served on the legal committees of The International association of Ports and harbours (IAPH) as well as the Port Management Association of Eastern and Southern Africa (PMEASA). Non Executive Board Member of Primeserv.

She is currently serving as General Counsel on the Executive Board of the Union of African Railways UAR, a specialized agency of the AU. She is also serving on a committee that is advising the Executive Board of the International Association of Railways (UIC) in Paris. She is the non-executive Chairperson of Gabcon and non-executive director of Reutech.

Cleopatra has vast local and international commercial and regulatory experience in the Freight and logistics industry both from a maritime and intermodal perspective. She was previously a consultant in the specialized finance department of one of South Africa's leading investment banks.

She holds a Bachelor of Arts in Law and Bachelor of Laws degrees from the University of Swaziland. A Higher Diploma in Tax Law from the University of Witwatersrand.

# International Manganese Institute

There actually is Mn ore in Turkey

Tan Wuji



ChinaLight is a central government-owned company, which trades commodities of raw material and invests in commodity production. Mr. Tan Wuji, as the Deputy General Manager of the ChinaLight Resources heads the industrial raw material department, including chrome-nickel, ferro-manganese, coal, titanium, zirconium, nonferrous metals and renewable products. He is in charge of the value chain development of each product and the consolidation of investment and trade platforms. The manganese ore mine site IMnI conference attendees will visit near Istanbul, is one of the investment projects of ChinaLight in Turkey.

Mr. Tan joined ChinaLight 2004, after he obtained a Bachelor's Degree in Economics from the University of International Business and Economics. He mainly engaged in trading and investment for chrome ore, stone, manganese ore, nonferrous metals, ships and other commodities. He has been working in Turkey for a year, responsible for local mine resource development.

Live Poll on

Best Presentation and IMnI Services

The Metal Bulletin Manganese Ore Index; Methodology and Results

Inaki Villanueva, Index Analyst  
Metal Bulletin



Inaki is an Index analyst at Metal Bulletin. He joined MB after having lectured at the University of Essex an MSc in Statistics and Econometrics. Prior to attending the University of Essex, Inaki had received a further MSc in Applied Economics from Universitat Pompeu Fabra in Barcelona. He has worked as a consultant at PriceWaterhouseCoopers, as a researcher for IESE Business School, and nowadays is lecturing at the Economics and Business Department of the Open University of Catalonia.

Inaki developed the new Iron Ore Fe Value-in-use Index and also developed the specifications and methodology for Metal Bulletin's two Manganese Ore Indices.

Wrap-up

Pedro Larrea, CEO, Ferroatlantica  
IMnI Supervisory Board Member

\*\*\*\*\* *TEA BREAK* \*\*\*\*\*



## IMnI 39th Annual Conference

Thursday, June 6, 2013

Session 2

The Manganese Industry Worldwide: Trends & Opportunities

Duncan Hobbs  
Macquarie Bank



Duncan Hobbs has 20 years' experience in business development, management consulting and market research roles in the non-ferrous metals and steel, bulk commodities and shipping industries.

Duncan joined Macquarie Group's highly-rated commodities research team, covering non-ferrous metals and ferroalloys markets including manganese, in early 2010. Previously he held a senior business development role reporting to the CCO at Nyrstar, the world's largest zinc producer.

He has also worked for Hatch Beddows, the London-based strategy consulting practice of Canadian engineering and business consulting company Hatch, where he led a number of projects for corporate and private clients in the iron ore, carbon and stainless steel and ferroalloys industries, the CRU Group covering iron and steel markets, and he began his career covering dry bulk shipping markets for Drewry Shipping.

Overview of the Manganese Industry

Alberto Saavedra, Market Research Manager, IMnI

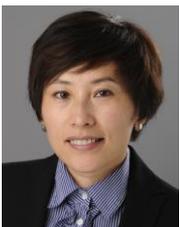


Alberto Saavedra joined the IMnI this year. He comes from Mexican manganese ore and ferroalloy producer Minera Autlan, where he was responsible for the company's market research. When at Autlan, he was a member of IMnI's Statistics Committee.

Alberto holds a Master's Degree in Evaluation and Project Management from the Universidad Panamericana, along with a Bachelor's degree in Economics and a diploma in international trade.

China MySteel Study

Yinong Shen, IMnI Greater China Representative



Yinong Shen joined IMnI in March 2012 as Chief Representative Officer Greater China. Born in Shanghai, she received a Bachelor Degree in Chemistry from Fudan University. After working five years as Chief Representative Officer in China for Metallurg Group, she moved to Switzerland to pursue an MBA at the International Institute for Management Development (IMD), in Lausanne.

After completing her MBA, she remained in Switzerland for 10 years working in business development, project management and strategic planning for several international companies, notably Rio Tinto Alcan and ABB. She also worked some years in industrial consulting till returning to China in 2012.

# International Manganese Institute

IMnI's Life Cycle Assessment (LCA) Project

Mohammed Ali



Mohammed Ali is the Regional Director for Hatch's Environmental Services Group based in Toronto. He has managed and conducted several sustainable development related projects, particularly involved in life cycle studies. He sits and is an executive member of various mining, environmental and sustainability committees in Canada and globally. He has conducted numerous engineering and ISO 14040 compliant life cycle studies for a range of clients in the oil and gas, mining, manufacturing, chemical, automotive, building and construction, and textile industries.

Mohammed's broad technical and management expertise stems from a background in research, engineering and business development, with specialization in process design, system modeling for industrial processes and greenhouse gas measurement and reporting. Project experience ranges from modeling resource and energy profiles of complex industrial systems to developing market oriented environmental information for retail sector product manufacturers. He has led project proponents in the submission of reports to Canada's Technology Early Action Measures on the GHG aspects of their technologies. This work and similar projects with project proponent funded through Sustainable Development Technology Canada and Climate Change Emissions Management Centre has given insights into innovative technologies, products and processes, for reducing greenhouse gas emissions. Mohammed holds a Chemical Engineer degree, has lived on three continents and is on the Executive Committee for the Canadian Mining Innovation Council Environmental Stewardship and Canadian Institute of Mining Greater Toronto West.

Wrap-up  
TBA

\*\*\*\*\**LUNCH IN MIYAKO RESTAURANT*\*\*\*\*\*  
*SPONSORED BY MINERACAO BURITIRAMA*

\*\*\*\*\**GROUP OUTING TO TOPKAPI PALACE*\*\*\*\*\*  
Departure from the hotel lobby at 14:30

\*\*\*\*\**BANQUET DINNER*\*\*\*\*\*  
*SPONSORED BY RONLY LIMITED*

Departure from the hotel lobby at 18:30