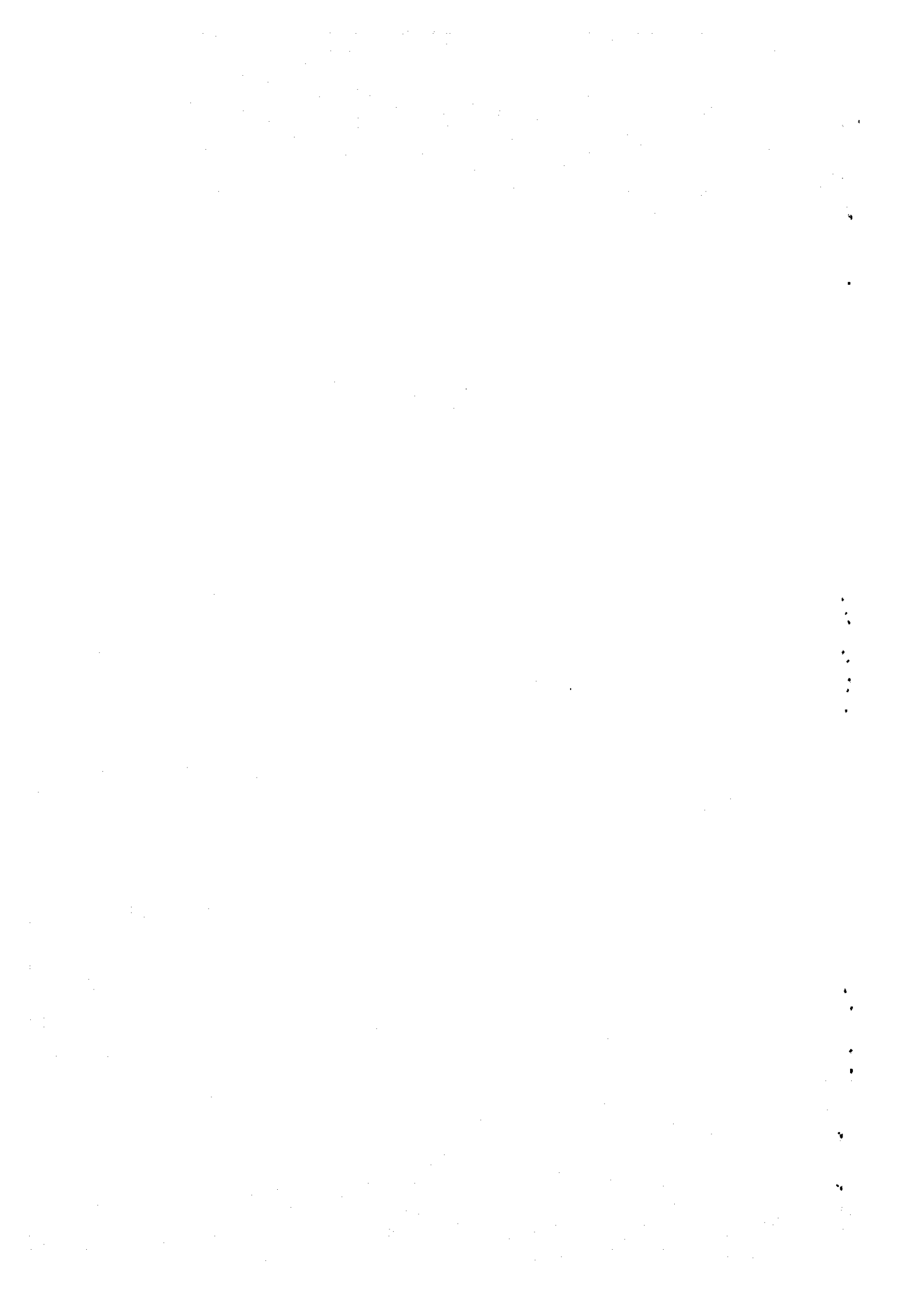


II 議事録



**MINUTES OF MEETING
for**

**THE MASTER PLAN STUDY
ON PROMOTION OF NON-FERROUS
METALS INDUSTRY
IN THE REPUBLIC OF KAZAKHSTAN**

AGREED UPON BETWEEN

**THE MINISTRY OF INDUSTRY AND TRADE
OF THE REPUBLIC OF KAZAKHSTAN**

AND

**THE SURVEY TEAM
OF THE JAPAN INTERNATIONAL COOPERATION AGENCY**

ALMATY, NOVEMBER 20, 1995



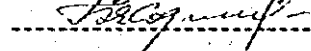
M.A. Murtazaev
Deputy Minister

Ministry of Industry and Trade

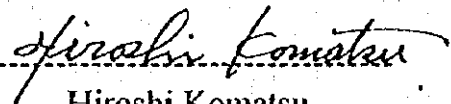


Valikhan K. Kulsartov
Head of the Chief Department
for Industrial and Trade Policy
Survey Team

Ministry of Industry and Trade

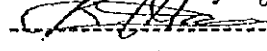


Boris Y. Sadchikov
Deputy Director General
Department for Non-Ferrous
Metallurgy Sector
Ministry of Industry and Trade



Hiroshi Komatsu
Deputy Leader of the JICA

Survey Team



Katsuhiro Otani
Deputy Leader of the JICA
Survey Team

A series of meetings, including the General Meeting, were held on the days of November 13 - 14, at the Ministry of Industry and Trade, hereinafter referred to as MIT, in Almaty, and participated by the representatives of the Ministry of Economy, Ministry of Geology and Underground Resources, Ministry of Industry and Trade of the Republic of Kazakhstan and the members of the JICA Survey Team, for the Master Plan Study on Promotion of Non-Ferrous Metals Industry in the Republic of Kazakhstan; those meetings were held based on the agreement between the JICA and representatives of relevant ministries in June 8 - 14, 1995.

At the General Meeting and working meetings, the parties reviewed the results of arrangements, organization and procedures for implementation of the project, JICA's Inception Report, the programme and procedure of the Survey and agreed as follows:

1. The parties principally determined the general scheme of the Master Plan Study on promotion of Non-Ferrous Metals Industry in the Republic of Kazakhstan.

2. The Kazakhstan side will complete the works on official formulation of the Steering Committee by December 1995.

3. Until such time that the Steering Committee is officially formulated, the MIT of the Republic of Kazakhstan will represent the Kazakhstan side and take responsibility for smooth implementation of the Survey, having appointed persons in charge from the MIT personnel.

- Mr. Koulsartov, Head of the Chief Department for Industrial and Trade Policy, MIT of the RK.

- Mr. Sadchikov, Deputy Director, Department for Non-Ferrous Metallurgy Sector, MIT of the RK.

4. The MIT will review a set of the Inception Report and Questionnaire, 20 copies of which have been presented by the JICA Survey Team and will be distributed by the MIT to the relevant ministries, institutions and organizations.

5. The both sides decided on principle to carry out the investigation in accordance with the basic clauses of the Inception

Report, foreseeing the possibility of agreed corrections in the course of the investigation when necessary.

6. The Kazakhstan side will provide professional teams to accompany the JICA Survey Team during their visits to the non-ferrous metallurgy enterprises.

7. The MIT will provide the JICA Survey Team with a room to work for period between November 14 and December 18, 1995.

8. The MIT will prepare Introduction Letters for the JICA Survey Team for visits and meetings with responsible representatives of the relevant Ministries and organizations with the aim to inform them and let them get additional data available.

9. The JICA Survey Team will work out and present a Progressive Report on the research works by February 27, 1996. The both sides will review the Progressive Report during the period between February 27 and 29 and will make further decisions.

ANNEX

1. Agenda of the General Meeting on November 13, 1995.
2. The List of Participants at the General Meeting.
3. The List of Ministries and Institutions, to which the Introduction Letters on the reception of the JICA Survey Team were addressed.
4. Remarks and suggestions of the Kazakhstan side concerning the Inception Report.
5. A brief information of the Kazakhstan side on the results of arrangements executed during June 14 - November 13, 1995.

ANNEXES:

1. Agenda of the General Meeting held on November 13, 1995.
2. List of Participants at the General Meeting.
3. List of Ministries and Organizations that recieved Introduction Letters regarding JICA Survey Team's visit were sent.
4. Comments and suggestions by the Kazakhstan side on the Inception Report.
5. Kazakhstan side's summary on the results of preliminary work for the period from June 14, 1995 to November 13, 1995.

ANNEX 5

Summary by the Kazakhstan side concerning the results of preliminary work during the period of June 14, 1995 to November 15, 1995.

1. Preliminary talks were held with the representatives of Japanese firms about the execution of the Minutes' clauses. The basic arrangements for Survey were reviewed by the Kazakh side.
2. Preliminary negotiations were conducted with the leaders of the Kazakhstan Non-Ferrous Metals Industry and managers of firms, that have been partly turned over to management firms. They discussed the aim of the Survey and necessary information that will be given to the delegation.
3. The Introduction Letters on the reception and aim of the JICA Survey Team were sent to several Ministries, organizations and Non-Ferrous Metals enterprises.
4. In accordance with the Japanese side's request candidates were selected as interpreters for the JICA Survey Team, specialists in Geology, Mining, Dressing, Metallurgy, Economics and Finance.
5. Visa support was provided to the main JICA Survey Team members and all Japanese working groups who arrived at Almaty before November 13, 1995.
6. On November 13 and 14, 1995, a working process was prepared by Ministries, Institutions and organizations of the Republic of Kazakhstan and JICA Survey Team on the organization of the General Meeting.
7. A List of the Joint Steering Committee members, confirmed with relevant Ministries and organizations, was formulated and sent to the Cabinet of Ministers for approval.

ANNEX I

MEETING AGENDA

1. Mr. Okada's speech with brief explanation of the programme.
15:00 - 15:05
2. Mr. Matsui's speech, the Ambassador Extraordinary and Plenipotentiary of Japan to Kazakhstan.
15:05 - 15:25
3. Mr. Bitimbaev's speech, Deputy Minister of Geology and Underground Resources.
15:25 - 15:50
4. Mr. Matsuura's speech, Leader of the Japanese delegation.
15:50 - 16:05
5. Mr. Kqulsartov's speech, Head of the Chief Department for Industrial and Trade Policy under the Ministry of Industry and Trade of the Republic of Kazakhstan.
16:05 - 16:30
- Break:** 16:30 - 16:40
6. Mr. Komatsu's speech with explanation of the Survey purpose.
16:40 - 17:00
7. Speeches, discussions.
17:00 - 17:25
8. Conclusion.

ANNEX 2

Meetings for the Master Plan Study on Promotion of the Non-Ferrous Metals Industry in the Republic of Kazakhstan

13, 14 November 1995

List of Participants

Kazakhstan Representatives

1. Cabinet of Ministers of the Republic of Kazakhstan
 - Kaliev Kamil Zakirovich - Head of Sector at the Department of Industry and Trade.
2. Ministry of Industry and Trade
 - Koulsartov Valkhan Kudushevich, Chief Department for Industrial and Trade Policy.
 - Sadchikov Boris Yakovlevich, Deputy Director of Non-Ferrous Metals Department.
 - Kakenov Nursha Kakenovich, Division Chief of Non-Ferrous Metals Department.
 - Kasimova Asia Salgaraevna, Division Chief of Non-Ferrous Metals Department.
 - Bednov Vyacheslav Vasilievich, Division Chief of Non-Ferrous Metals Department.
3. NAK "Kazakhstan Tusti Metaldary"
 - Ardasenov Stalinbek Borisovich, President.
 - Pigulin Vladimir Aleksandrovich, Vice President
 - Rogodzinsky Evgenii Ivanovich, Chief of the Research - Technical Division
 - Khomyakov Aleksandr Petrovich, Chief of the Metallurgy Division
 - Omarov Abiyar Mukhamedjanovich, Chief Concentratist

- Ibragimov Yadygar Mukhtarovich, Head of Subdivision of Precious Metals

- Merekeshev Mukhit Merekeshevich, Chief Geologist.

4. Ministry of Geology and Underground Resources

- Bitimbaev Marat Dzakupovich, Deputy Minister

- Shchelchikov Evgenii Mikhailovich, Deputy Director

- Akilbekov Siaabek Amanbekovich, Director

- Birulin Viktor Aphanasevich Head of Economic and Conjunction Department

5. Ministry of Economics

- Zharkenov Marat Iskanderovich, Head of the Chief Department for Industrial and Trade Policy

- Akhmetov Farabi Iljasovich, Deputy Head of the Chief Department

5. Managing Firms

- Kajukov Bakhyt Abdrashevich, Vice-President of the Managing Firm "Postovalov & Co."

- Chulkov Victor Borisovich, Head of the Representative Office of the Managing firm "Dilence Trading LTD"

- John Van Leem, Executive Director of the "Kazakhstan - Samsung" Joint Venture

7. Enterprises

- Prokhodov Vasily Semenovich, Director General of Irtysh Polymetal Combine.

- Temirkhanov Kenes Temirkhanovich, Chief Mine-surveyor JSC "Balkhashmys"

- Kosyakov Boris Vasilievich, Chief Geologist, JSC "Balkhashmys"

11. Japanese Survey Team

- Atsuo Matsuura, Leader of the Survey Team
- Takashi Mayama
- Hiroshi Komatsu
- Katsuhiro Otani
- Kunio Okada
- Yuji Nishikawa
- Atsushi Takeyama
- Seigo Akiyama
- Wakaba Sakurai
- Yutaka Hirabayashi

ANNEX 3

List of Ministries that were circularized letters concerning receptacles the JICA Survey Team:

1. Ministry of Geology and Underground Resources
2. Ministry of Economics
3. Ministry of Foreign Affairs of the RK
4. Ministry of Finance of the RK
5. Ministry of Transport and Communications
6. Ministry of Energy and Coal Industry
7. National Bank of the RK
8. Ministry of Labour
9. Ministry of Ecology and Biological Resources of the RK
10. State Committee on State Property of the RK
11. State Committee on Privatization
12. National Patent Agency
13. Ministry of Oil and Gas
14. National State Company "Kazakhstan Tusti Metaldary"

The questions,
comments and proposals

of the Ministry of Industry and Trade of the Republic of Kazakhstan on Preliminary Report of Japan's International Cooperation Agency (JICA) regarding the working out of Master Plan on development of non-ferrous metallurgy of Kazakhstan

The Ministry highly evaluates the following final objectives of the Project to be implemented, which are:

- to prepare comprehensive Summary General Plan of Development of non-ferrous metallurgy of Kazakhstan, which will consist of integral connected recommendations on solution of problems of deposits' geology, raw materials base of mines, technical production, on creation of schemes of profitable operation of mining and metallurgical enterprises, Plans of long-term investments;
- recommendations on how to improve the legislative base of mining and metallurgical industry and directions of management's structures reorganization.

At the same time, there is a number of questions, proposals and comments to the Preliminary Report.

Questions:

1. What will be specifically presented in the Plan of long-term investments ?
2. About the history of processes and facts, which took place in CIS countries and Kazakhstan during 1991-1994 years, and their influence upon the present state of non-ferrous metallurgy. How it will be presented in the study work ?
3. In which form and volume the transfer of recommendable technologies, schemes etc will be executed ?
4. How the recommendations on rare and precious metals, by-metals will be specified in the study work ?
5. How the metals trading policy and recommendations on prevention the dumping will be determined in the Master Plan ?
6. Regarding the secrecy of technical information, being a kind of commercial secret of enterprises, which could not be disclosed to the Japanese side in its full volumes. How it will have an influence upon the content of Master Plan ?

RESOLUTION
on Preliminary Report
on working out of Master Plan on development
of non-ferrous metallurgy of Kazakhstan

After the study of Preliminary Report on working out of Master Plan on development of non-ferrous metallurgy of Kazakhstan, the Main Department of Industrial Policy of the Ministry of Economy of the Republic of Kazakhstan has decided to agree with the statement of a task and conditions of performance of works stipulated in the Report.

At the same time, taking into consideration the geographical location of Kazakhstan, we would like to point out the necessity to deepen the study of matters regarding the transportation of metal goods for the export, increasing marketable value of industrial products.

As it is known, Kazakhstan has no outlet to the world' ocean and transportation of ore, concentrates within the bounds of Republic, as well as metals for the export is being carried out by railway transport, that led to increasing of the prices by 10-15% and more.

In working the Master Plan it is recommendable to study the proposals on decreasing of transport costs, and for this purpose, probably, it will be necessary to work out the new transport schemes, which will allow to avoid the discriminative measures and solve the abovementioned problems at the world's level.

The second important task, coming from the first one, is the necessity to produce the goods with high marketable value to be competitive on the world's market. In this case it will be possible to decrease the volume of transport costs from the one side and to improve the structure of industrial output from the another side, i.e. to overcome the raw materials orientation of Republic's mining and metallurgical complex.

Taking into account, that Republic's legislative acts are supporting the creation of joint ventures on different conditions like capital sharing (profit), output sharing or on other conditions, and investment climat is favourable to foreign capital attraction, it is proposed to consider the possibility of creation of joint ventures on production of electric technics, radio electronics, semi-conductive technics, instrument-making products etc.

In connection with abovementioned, we would like to ask Japanese side to take into consideration our wishes, realization of which will promote the strengthening of economic independence and safety of Kazakhstan.

Deputy Chief of Main Department
Of Industrial Policy
Of the Ministry of Economy

Mr. Ph.Akhmetov

Comments:

1. In initial Plan it is recommendable to show in detail the methodological scheme of working out of summary recommendations (Chapter 4.4)
2. In Chapter 5 of a Plan it is recommendable to indentify the immediate and top priority information to be required.

Proposals:

1. It is advisable, that Japanese side has to submit to Kazakhstan side the Draft of initial (intermediate) Report by 15th of January 1996.

Chairman of Steering Committee,
First Deputy Minister

Mr. Murtazaev

ANNEX 5

Summary by the Kazakhstan side concerning the results of preliminary work during the period of June 14, 1995 to November 15, 1995

1. Preliminary talks were held with the representatives of Japanese firms about the execution of the Minutes' clauses. The basic arrangements for Survey were reviewed by the Kazakh side.
2. Preliminary negotiations were conducted with the leaders of the Kazakhstan Non-Ferrous Metals Industry and managers of firms, that have been partly turned over to management firms. They discussed the aim of the Survey and necessary information that will be given to the delegation.
3. The Introduction Letters on the reception and aim of the JICA Survey Team were sent to several Ministries, organizations and Non-Ferrous Metals enterprises.
4. In accordance with the Japanese side's request candidates were selected as interpreters for the JICA Survey Team, specialists in Geology, Mining, Dressing, Metallurgy, Economics and Finance.
5. Visa support was provided to the main JICA Survey Team members and all Japanese working groups who arrived at Almaty before November 13, 1995.
6. On November 13 and 14, 1995, a working process was prepared by Ministries, Institutions and organizations of the Republic of Kazakhstan and JICA Survey Team on the organization of the General Meeting.
7. A List of the Joint Steering Committee members, confirmed with relevant Ministries and organizations, was formulated and sent to the Cabinet of Ministries for approval.

MINUTES OF MEETING

AGREED UPON BETWEEN

**THE STEERING COMMITTEE
OF THE REPUBLIC OF KAZAKHSTAN**

AND

**THE SURVEY TEAM
OF THE JAPAN INTERNATIONAL COOPERATION AGENCY**

for

THE MASTER PLAN STUDY

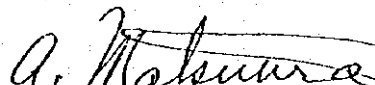
ON

**PROMOTION OF NON-FERROUS METALS INDUSTRY
IN THE REPUBLIC OF KAZAKHSTAN**

Almaty, March 1, 1996



M.Zh. Bitimbaev,
Sub-Chairman of the Steering
Committee, Deputy Minister
of the Geology and Protection of
Underground Resources of the
Republic of Kazakhstan



Atsuo Matsuura,
Leader of the JICA
Survey Team

In June 1995, Kazakhstan and Japan exchanged signed minutes of the meeting regarding the survey for the Master Plan Study on Promotion of Non-ferrous Metals Industry. The Japan International Co-operation Agency (JICA) Survey Team headed by Mr. Atsuo Matsuura, carried out the 1st Site Investigation of the Project during the period of November 10 to December 18, 1995, in accordance with the agreement between the Government of the Republic of Kazakhstan and the Japanese Government.

The JICA Survey Team prepared the progress report with respect to the findings in the 1st Site Investigation as well as the review of the on-going study plan and presented it to the Kazakhstan side on the occasion of the Steering Committee Meeting held on February 28, 1996, at the Head office of the Ministry of Industry and Trade in Almaty, Kazakhstan. The Kazakhstan members of the Steering Committee and JICA Survey Team discussed, in sincere and friendly manner, subjects arising from the current study and a realistic program for the on-going study.

As the result of the Steering Committee Meeting, the Kazakhstan and Japanese sides mutually agreed as follows:

1. Prior to the Steering Committee Meeting on February 28, 1996, twenty copies of both the progress report and its summary were presented to the Kazakhstan side by the Japanese Survey Team and were accepted by the Kazakhstan side.
2. The Japanese Survey Team, comprising Mr. Matsuura, the Chief Leader, and three deputies, briefed the Steering Committee on the tentative results of assessment of findings in the 1st Site Investigation, including economic aspects of major combines and ore deposits. At the same time, a study program for the 2nd Site Investigation was proposed by the Japanese Survey Team and discussed between the Survey Team and the Kazakhstan members of the Committee. The program was settled as described in chapter 6 of the progress report.
3. At the Steering Committee Meeting, various subjects were raised on the progress report and discussed between the Kazakhstan participants and Japanese Survey Team. The major subjects for the 2nd Site Investigation were agreed upon between both sides as follows:
 - 1) Study of the metal fabrication sector
 - 2) Examination of concentrators
 - 3) Further assessment of the management contract scheme
 - 4) Financial analysis and economic assessment of individual combines
 - 5) Improvement of sulfuric acid production and its utilization
 - 6) Review of standards and codes for environmental control and study of effective environmental protection measures
 - 7) Realistic development schedule of unexploited ore deposits
 - 8) Other related subjects

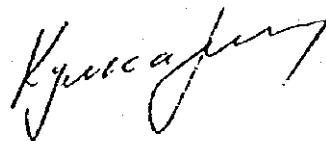
4. The program for the 2nd Site Investigation was settled principally as described in chapter 6 of the progress report. However, it was requested by the Kazakhstan side that a detailed plan and schedule should be submitted by the Japanese Survey Team with sufficient time allowance prior to the commencement of the Investigation.

5. The Japanese Survey Team expressed their sincere appreciation to the Kazakhstan side for its full cooperation and assistance extended to the Survey Team during the 1st Site Investigation and this meeting.

The Kazakhstan side comprehended the significance of the current Project and the necessity of mutual cooperation, and indicated its firm intention to extend further cooperation and assistance to the Japanese Survey Team.

The Japanese Survey Team and the Kazakhstan side prepared the minutes of the meeting, as described, in duplicate to be signed by their respective, duly authorized representatives as evidence of their full understanding of the contents and shall keep a copy.

6. Appendix: Participant List of the Steering Committee Meeting

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APPENDIX

Participant List of the Steering Committee Meeting on 28 of February 1996

Kazakhstan side:

- Mr. M.Zh. Bitimbaev - Sub-Chairman of the Steering Committee,
Deputy Minister of Geology and Protection
of underground resources of the Republic of
Kazakhstan
- Mr. V.K.Kulsartov - Member of Steering Committee,
Head of Main Department on industrial policy
and export development of MITI
- Mr. S.F. Ibraimov - Chief of economic policy Department of the
Cabinet of Ministers of RK
- Mr. F.I.Akhmetov - Deputy Head of Industrial Policy Main
Department of the Ministry of Economy of RK
- Mr. A.K.Tilga - Chief of division of industrial policy and priority
projects of Main Department on industrial policy
and export development of MITI
- Mr. V.A. Birulin - Head of Department on market analysis of
MinGeo
- Mr. G.F.Glukhota - Head of Industrial Investment
Department of MITI
- Mr. E.T. Nauryzbaev - Head of "Geoinform" Department of MinGeo
- Mr. M.A.Mambetov - Chief specialist of Mining and metallurgical
complex Department of MITI
- Mrs. A.S. Kasymova - Chief Specialist of MITI
- Mr. A.N.Akhmetov - Chief specialist of the State Committee on
foreign capital utilization under the Ministry of
Finance of RK
- Mr. Ya.M.Ibragimov - Head of subdivision on precious metals of
NJSC "Kazakhstan tusti metaldary"

Japanese side

- Mr. Atsuo Matsuura** - Leader of the JICA Survey Team
- Mr. Takashi Mayama** - Sub-Leader of the JICA Survey Team
- Mr. Hiroshi Komatsu** - Sub-Leader of the JICA Survey Team
- Mr. Katsuhiro Otani** - Sub-Leader of the JICA Survey Team

MINUTES OF MEETING

AGREED UPON BETWEEN

**THE STEERING COMMITTEE
OF THE REPUBLIC OF KAZAKHSTAN**

AND

**THE SURVEY TEAM
OF THE JAPAN INTERNATIONAL COOPERATION AGENCY**

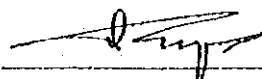
FOR

THE MASTER PLAN STUDY


ON

**PROMOTION OF NON-FERROUS METALS INDUSTRY
IN THE REPUBLIC OF KAZAKHSTAN**

Almaty, July 12, 1996



M. Zh. Bitimbayev,
Sub-Chairman of the Steering
Committee, Deputy Minister
of the Geology and Protection of
Underground Resources of the
Republic of Kazakhstan



Atsuo Matsuura,
Leader of the JICA
Survey Team

MINUTES OF THE MEETING

The Steering Committee Meeting on the Master Plan Project for the Promotion of the Non-Ferrous Metal Industry in the Republic of Kazakhstan was held at the Venue of the Ministry of Industry and Trade on the Day of July, 11, 1996 according to the programme as per attached Annex-1. The members of the Japanese Survey Team and of the Kazakhstan Side who participated in the meeting are listed in Annex-2.

The Japanese Survey Team reported the progress of the Project to date as per attached Annex-3 that was vigorously discussed between the two parties. The Kazakhstan Side Comments on the report by the Japanese Survey Team are summarized in attached Annex-4.

It was agreed between both parties that the presentation of the Interim Report will be held in October, 1996 at the Venue of the Ministry of Industry and Trade. The interim Report will be prepared in accordance with the Concept of the Master Plan for the Promotion of the Non-ferrous Metals Industry in Kazakhstan as shown in Annex-5. On the occasion of presentation, a seminar will be held to introduce practices in various fields of the non-ferrous metals industry of the western free trade world.

Annex-1 The Programme of the Steering Committee Meeting

Annex-2 The List of the Participants

Annex-3 The Summary of the Progress of the Project by the Japanese Survey Team

Annex-4 The Summary of the comments by the Kazakhstan Side

Annex-5 The Concept of the Master Plan for the Promotion of the Non-ferrous Metals Industry in Kazakhstan

ANNEX-1

Program of the Steering Committee meeting

1. Date: 11th of July'1996 (Thursday)
Time: 15:00 - 18:00 P.M.

2. Place: MITI Meeting Room

3. List of participants

1) Kazakhstan side: Members of the Steering Committee and specialists.

2) Japanese side: Members of JICA mission, including interpreters

3) Master of ceremony: Mr. Okada
jointly with Kazakhstan side's
Master Mr.Kulsartov

4. Subjects:

(1) Explanation of Program of Meeting

(2) A greeting speech by Chairman of the Steering Committee.

(3) A greeting speech by Leader of JICA Mission Mr.Matsuura.

(4) Brief outline of the Master-Plan by Mr. Komatsu

(5) Japanese side's opinion concerning Memorandum of March 1996 and additional questions by the Kazakhstan side.

(6) Present situation of the 3rd Survey.

(7) Further requests of the Kazakhstan side

(8) Closing of the Meeting (Mr.Matsuura)

ANNEX-2

LIST

of JICA mission members, participants of the Steering Committee
Meeting on 11th of July 1996

- | | |
|---------------------|---|
| 1. Mr. A.Matsuura | Leader |
| 2. Mr. T.Mayama | Promotion planning of Non-ferrous metals industry |
| 3. Mr. K.Otani | Planning of efficient management |
| 4. Mr. H. Komatsu | Planning of production efficiency |
| 5. Mr. H. Matano | Financial analysis |
| 6. Mr. K.Okada | Macroeconomic analysis |
| 7. Mr. A. Takata | Environmental administration |
| 8. Mr. Sh. Nishide | Evaluation of copper processing projects |
| 9. Mr. A. Takeyama | Evaluation of copper mine (Geology) |
| 10. Mr. S. Akiyama | Evaluation of copper mine (mining) |
| 11. Mr. M.Hisatsune | Copper ore dressing technology |
| 12.Mr.H.Tanaka | Copper refining technology (smelting technology) |
| 13.Mr. T.Yoshida | Copper refining technology (refining process) |
| 14.Mr. E.Nomura | Lead refinig technology |
| 15.Mr. A.Onozaki | Zinc refining technology (smelting process) |
| 16.Mr. Y.Nishimura | Zinc refining technology (refining process) |
| 17. Mr.F.Koda | Data processing technology |
| 18.Mr. Yamamoto | Coordinator |

ANNEX-2

LIST of the Kazakhstan side participants on the Meeting of Steering Committee and Japanese Survey Team

Steering Committee

1. Mr. M.Zh.Bitimbaev Deputy Minister of Geology and
underground resources protection, Sub-
Chairman of the Steering Committee

Members of the Committee

2. K.Z.Valiev Governmental office
3. S.V.Ibraimov Governmental office
4. V.K.Kulsartov Head of the Main department on industrial
policy and export promotion of MITI of RK
5. B.Ya.Sadchikov Deputy Head of the Main Department of
MITI of the Republic of Kazakhstan
6. Mr.V.A.Musin Head of Department of the State Committee
on foreign capital utilization under the
Ministry of Finance of RK
7. Mr. L.T.Baturov Head of the Main Department of
(instead of Mr.M.I.Zharke- Ministry of Economy of RK
nov)

Invited specialists from the Ministry of industry and trade of RK

- 1.Mr. T.U.Kambakov Deputy Head of the Department
- 2.Ms. A.S.Kasymova Chief specialist
- 3.Ms. A.Izmailova Chief specialist
- 4.Mr. S.K.Zhamanbaev Chief specialist
5. Ms.A.S.Zulkasheva Chief specialist
6. Mr.Zh.Knatov Chief specialist
7. Mr.E.I.Rogozhinsky Specialist of NJSC "KTM"
8. Ms.B.Damebaeva Leading specialist
9. Mr. V.V.Bednov Head of Main Department

Specialists from the Ministry of Geology and underground resources protection of RK

1. Mr. R.R.Smagulov Deputy Head of Main Department of
mineral resources

2. Mr. E.M.Schelchkov "Geoinform"

3. Mr. S.A.Akylbekov Head of Hard minerals Department

Specialists from the Ministry of Ecology and Bioresources of RK

1. Mr. Yu.I.Eydinov Chief expert-consultant

Specialists from the Ministry of Economy of RK

1. Mr. F.I.Akhmetov Deputy Head of the Main Department

Annex-3 The Summary of the Progress of the Project by the Japanese Survey Team.

The Chief Director of the Japanese Survey Team, Mr. Matsuura, reported the Steering Committee Meeting the Progress of the Project to-date as follows, so as to respond to the requests and queries to the Project presented at the last Steering Committee Meeting held on 28th of February, 1996.

1. Promotion of Exploration

A study is being carried out for ore reserves of existing deposits, their development programmes and their economic viability. According to the study to-date, it is essential to develop new ore deposits for the next 10 years in order to sustain the operation of the non-ferrous metals industry in Kazakhstan. How to carry out exploration and how to raise fund for exploration is now being studied with reference to practices in western countries.

The initial stage of exploration is often very risky for a single private company to bear and is therefore, advisable to be carried out by a governmental institution. Funds for exploration may be available as a form of technical assistance by foreign countries or from United Nations Revolving Funds.

2. Modernization of Mines

Various problems associated with mines in Kazakhstan is being studied from metal market point of view in the western world. It is the most important task for the Survey Team to collect information with respect to present economic status of operating mines. The co-operation of the Kazakhstan Side is indispensable and will be highly appreciated. The Japanese Survey Team may extend its queries by writing even after going back to Japan and solicits the co-operation of the Kazakhstan Side in this regard as well.

3. Plan for Modernization of the Non-ferrous Metals Industry in the Transition Period to Market Economy

- 3.1. Measures for promoting development of unexploited ore deposits are being studied as well as for accelerating expansion of production at existing mines.
- 3.2. Closure of unprofitable mines is carried carefully being studied so that shortage of raw material supplies to smelters and refineries dose not take place. Probable losses of containing operation of unprofitable mines are also being estimated. A realistic system is being sought for rescuing these mines.

4. Stable Supply of Raw Materials

- 4.1. We consider measures and means that should be used to stabilize the production of concentrates in Kazakhstan /as discussed in paragraph 1/
- 4.2. Smelters which are depending on imported concentrates for substantial proportions of their raw materials are being examined from view point of raw material supply sources.(Lead, Copper)
 - a) Estimation is being made for a realistic amount ($\pm 10\%$) of annual raw material supplies to smelters.
 - b) In case that shortage of imported raw materials supplies is obvious, possible production rates of metals will be estimated the smelters suffered from the shortage.
- 4.3. Raw Materials other than Concentrates.
The present state of recycling scraps, dusts containing metals and other materials is being studied on this occasion of the 2nd Site Investigation. A desirable recycling system will be sought by analyzing collected data.

5. Improvement in Metal Fabrication

In promoting the Non-ferrous Metal Industry, it is one of important tasks to upgrade forms of metal products with increasing their added values. A specialist for metal fabrication industry, included in the Japanese Survey Team will collect information for present state, future plans and domestic demands of products of the metal fabrication industry in Kazakhstan and will study measures for promotion of the industry in co-operation with a specialist of the Kazakhstan Side, A system for quality control is particularly significant for this industry.

Possibility of technical co-operation will be sought for establishing the quality control system.

6. Environmental Protection

6.1. Environmental Control and its System

The present state of the environmental control system and its problem in Kazakhstan were studied in the 1st Site Investigation. On this occasion, a study is being carried out for practices for environmental protection at each site. A recommendation will be prepared by synthesizing all information collected. Possible financial sources will be also sought.

6.2. Environmental Control at each Combines

A study is being made for environmental control of working conditions, fugitive gasses, effluent and waste materials at individual combines. A special emphasis is placed on measures to prevent emission of sulfurous acid gasses included in fugitive gasses from smelters. For this purpose, the present operations of sulfuric acid plants is being examined. The domestic market for sulfuric acid is also being researched.

Possibility to produce artificial gypsum using sulfuric acid will be sought in the present Site Investigation.

At the present stage, we consider that the Ministry of Industry and Trade should take responsibility for the environmental management related to the Non-ferrous Metal Industry and that it will be advisable to set up an Environmental Management Center within the Ministry.

7. Improvements in Corporate Management

Profit is the most important factor to manage and sustain an enterprise under the market economy. Our effort is being made to collect sufficient information for estimating economic viability of each combine.

In western practices, the mining ore dressing sector is separately managed from the smelting-refining sector even within a single enterprise.

8. Market

The trends in demand for copper, lead and zinc in Russia and in other CIS countries as well as Kazakhstan is the important task in our work. Please provide information for us about the internal market of sulfuric acid.

9. Role of the Ministries of Industry and Trade and of Geology and Underground Resources Conservation

The roles of the two Ministries are indispensable to swiftly stabilize and promote the Non-ferrous Metal Industry so that the Industry should substantially contribute to the National Economy under the transition period to the market economy.

Recommendation will be prepared for the Roles of the two Ministries with references to the measures taken by the Japanese Ministry of International Trade and Industry for promotion of various industries after the World War II.

Examples will be presented for practices adopted by the Japanese MITI to rescue the troubled coal industry in Japan during the period of 1960s and 1970s.

10. The development of the development plan proposed by the Kazakhstan Side

The Plan for the Development of the Industry is being drawn up for the following periods'

1996-2000	Creation of the system of stabilization of the industry
2000-2005	Development of the industry by creating the system of privatization and by implementing basic development projects

The Plan is based on privatization

a) Conclusion of management contracts as a basic measure for stabilization of plants.

- b) Finding investors and creditors for implementation of basic projects as the basic measure for the industry's development.

As we see it, the above mentioned were included in the plan as the action programme. We would like to understand your intentions more clearly at this stage, particularly for the following points:

- a) The priority of the Non-ferrous Metals Industry within the Government Policy for the Promotion of Various Industries as a whole, taking the Industry's peculiarity based on underground resources.
- b) Interrelationship among the measures such as the Privatization, the Management Transfer Contact and the Policy for Investment and or credit.
- c) Confirmation of the Policy of Kazakhstan Side with respect to important enterprises or projects which are not in line with the Plan drawn by the Ministry of Trade and Industry.

ANNEX-4

To the Minutes of The Steering Committee Meeting on The Master-Plan on the Promotion of Non-ferrous metals industry of the Republic of Kazakhstan and Survey Team of Japan International Cooperation Agency

Comments by the Kazakhstan Side

The Kazakhstan Side acknowledged that the progress of the Master Plan Project to-date is satisfactory as reported by the Japanese Survey Team at the Steering Committee Meeting. In the course of discussion at the Steering Committee Meeting, the Kazakhstan Side expressed its requests as follows;

Ministry of Trade and Industry

1. The Master-Plan should include the western world's experiences in transferring management of metallurgical complexes to foreign investors with its methodology and schemes towards complete privatization of the metallurgical complexes. Methods of economical valuation should also be presented in the report.
2. Possible ways to governmental supports to the Non-ferrous Metals Industry are to be included in the report, together with the Japanese experiences in this regard.

Ministry of Economy

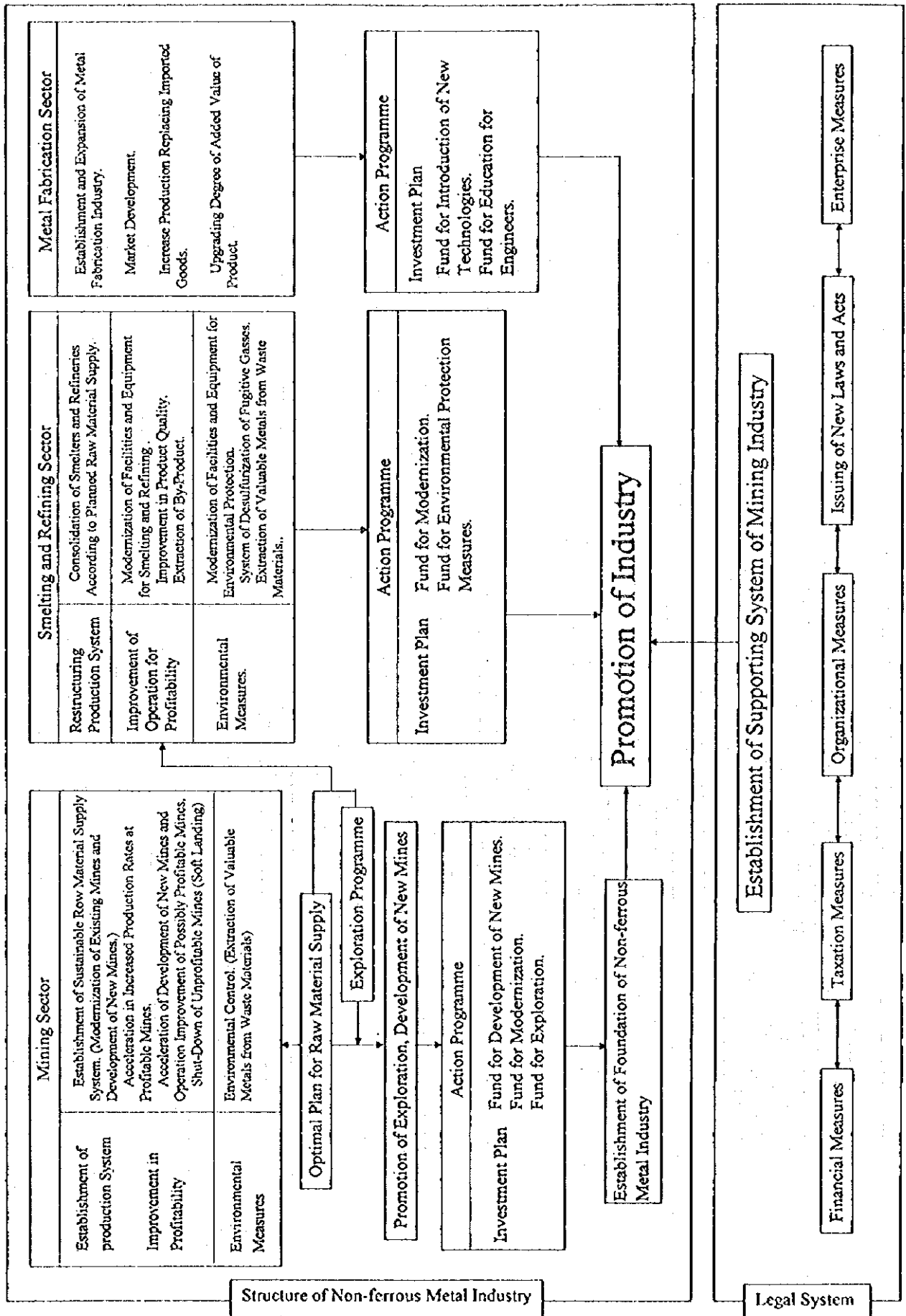
1. The representative of the Ministry indicated its request that the Master Plan indicates a prospect for utilization of rare metals produced in metallurgical complexes (rhenium, osmium-187, cadmium, bismuth, indium etc.) in order to produce materials for high-technology uses.

Ministry of Ecology

1. With respect to environmental control, the Master Plan should deal with measures how to solve problems associated with all kind of industrial waste materials in solid, liquid or gaseous form.
2. Recommendations for establishing financial supports in environmental conservation should include the governmental commitment as well as responsibility and obligation of the Industry.

ANNEX-5

CONCEPT OF MASTER PLAN ON THE PROMOTION OF THE NON-FERROUS METALS INDUSTRY IN KAZAKHSTAN



MINUTES OF MEETING

AGREED UPON BETWEEN

**THE STEERING COMMITTEE
OF THE REPUBLIC OF KAZAKHSTAN**

AND

**THE SURVEY TEAM OF
THE JAPAN INTERNATIONAL COOPERATION AGENCY**

FOR

THE MASTER PLAN STUDY

ON

**PROMOTION OF NON-FERROUS METALS INDUSTRY
IN THE REPUBLIC OF KAZAKHSTAN**

Almaty, October 28, 1996

M.A. Murtazaev

Mr. M.A. Murtazaev,
Chairman of the Steering
Committee, Acting Minister
of Industry and Trade
of the Republic of Kazakhstan

A. Matsuura

Mr. Atsuo Matsuura,
Leader of the JICA
Survey Team

1. The Steering Committee Meeting was held at the venue of the Ministry of Industry and Trade on the day of 22nd of October, 1996, with respect to the interim report of the Master Plan Study on the Promotion of the Non-ferrous Metals Industry in the Republic of Kazakhstan.

2. The Meeting was chaired by Mr.Murtazaev, Acting Minister of the Ministry and was attended by the Kazakhstan members of the Steering Committee and the JICA Survey Team as listed in Annex-1. The program is also attached in Annex-2.

3. The JICA Survey Team submitted thirty (30) copies of the interim report in English and twenty (20) copies of its summary in Russian. The Survey Team made a presentation on the results of its investigation to date according to the interim report. A vigorous discussion was made between the members of the Steering Committee and the JICA Survey Team.

4. The content of the interim report and the presentation by the JICA Survey Team were generally accepted and consented by the members of the Steering Committee. However, further comments and requests, if any, will be transmitted to the JICA Survey Team not later than 5th of November, and will be taken into account in the final draft report.

5. In the course of the discussion, the subject with respect to the accumulated debt and arrears was raised by the JICA Survey Team as a serious and urgent matter for restoration of the presently troubled financial state of each non-ferrous metals combines. The economic assessment of each combine has been made in the interim report without taking into account of this subject. The subject was seriously discussed between the Kazakhstan and the Japanese specialists in the series of the Steering Committee and working group meetings. The members of the Steering Committee were satisfied with the way of the interim report dealing with this subject.

6. A Seminar was also held at the venue of the Ministry of Industry and Trade on the day of 23rd of October, 1996, and was attended by the members of the Steering Committee and the JICA Survey Team, together with other invited participants as listed in Annex-3.

7. At the seminar, presentations were made on various subjects arising from the current project by two (2) Kazakhstan speakers and six (6) speakers from the JICA Survey Team. The program of the seminar is attached in Annex-4. Exchange of opinions in the Seminar was fruitful and will be useful to upgrade the content of the interim report.

8. Two sets of personal computers and printers were donated to the Steering Committee by the Japanese Survey Team according to the request made by the Kazakhstan Side.

9. It was agreed between the Kazakhstan Side and Japanese Side that the final draft report will be submitted to the Steering Committee in December, 1996.

10. The Kazakhstan Side expressed its wishes to create new projects on the basis of recommendations made in the final report of the current project.

The Steering Committee expressed deep gratitude to the Team for their efforts in preparing this interim report. The Ministry of Industry and Trade promised to distribute the relevant ministries and to review the interim report.

The Japanese Survey Team expressed its sincere appreciation for the co-operation by the Kazakhstan side in the course of implementing this project.

In carrying out the Master Plan Study on Promotion of Non-ferrous Metals Industry described in this report, the Kazakhstan Side will make further in-depth study on it. In this connection, they requested the Japanese side to afford close cooperation in exchange of information and mutual communication.

In witness of the above mentioned matters, both sides signed the Minutes of the Meeting on the day of October, 28, 1996, and each side shall keep an authentic copy each of the Minutes of the Meeting.

Annex - 1 List of the Participants of the Steering Committee Meeting

Annex - 2 Program of the Steering Committee Meeting

Annex - 3 List of the Participants of the Seminar

Annex - 4 Program of the Seminar

ANNEX- 1

List of Participants of the Steering Committee Meeting
on 22nd of October 1996

Kazakhstan side:

- Mr. M.A.Murtazaev - Chairman of the Steering Committee,
Acting Minister of the Industry and Trade
of the Republic of Kazakhstan
- Mr. V.K.Kulsartov - Member of the Steering Committee,
Head of Main Department on industrial policy
and export promotion of MIT of the Republic of
Kazakhstan
- Mr. B.Ya.Sadchikov - Member of the Steering Committee,
Acting Director of Mining-metallurgical complex
department of MIT of the Republic of Kazakhstan
- Mr.S.V.Ibraimov - Chief of economic policy Department of the
Cabinet of Ministers of Republic of Kazakhstan
- Mr. V.A.Musin - Chief specialist of International Economic Dept.
of Committee on foreign capital utilization under
the Ministry of Finance of the Republic of
Kazakhstan

Japanese side:

- Mr. A.Matsuura - Leader, Summarise
- Mr. T.Mayama - Promotion Planning of Non-ferrous
metals Industry
- Mr. K.Otani - Corporate Management
- Mr. H.Komatsu - Production Management
- Mr. A.Takata - Environmental Administration
- Mr. H.Matano - Financial Analysis

Mr. E.Nomura - Metallurgical Technology
Mr. F. Koda - Data Processing
Mr. A.Abdurahman - Project Coordination

ANNEX - 2

Program of the Steering Committee Meeting

1. Date: 22nd of October 1996 (Tuesday)
Time: 10:00 - 13:00 A.M.
2. Place: MITI Meeting Room
3. List of Participants:
 - 1) Kazakhstan Side: Members of the Steering Committee and specialists
 - 2) Japanese Side: Members of JICA Mission, including interpreters
4. Subjects:
 - (1) Opening speech made by Mr.Murtazaev, Chairman of Steering Committee, Acting Minister of MITI of the Republic of Kazakhstan
 - (2) Greeting speech made by the Leader of JICA Mission Mr.Matsuura.
 - (3) Outline of the Interim Report by Mr.Komatsu, Sub-Leader of JICA Mission
 - (4) Briefing of the Interim Report by Mr.Otani, Sub-Leader of JICA Mission
 - (5) Exchange of opinions concerning the Interim Report
 - (6) Closing of the Meeting by Mr.Kulsartov, Member of the Steering Committee.

ANNEX - 3

List of the Participants of the Seminar

Kazakhstan side:

Ministry of Industry and Trade of the Republic of Kazakhstan

1. Mr.Kulsartov V.K.
2. Mr. Sadchikov B.Ya.
3. Ms.Kasymova A.S.
4. Ms. Izmailova A.A.
5. Mr. Tilga A.K.
6. Ms.Vendel O.S.
7. Ms.Zulkasheva A.S.
8. Mr.Glukhota G.F.
9. Mr. Kambakov T.U.
- 10.Mr. Zhamanbaev S.K.
- 11.Mr.Knatov Zh.A.
- 12.Ms.Damebaeva B.K.
- 13.Mr.Kakenov I.K.

**Ministry of Geology and Preservation of Underground Resources
of the Republic of Kazakhstan**

1. Mr.Akylbekov S.A.
2. Mr.Schelchkov E.M.
3. Mr. Nauryzbaev

**Ministry of Economy
of the Republic of Kazakhstan**

1. Mr.Azemov V.A.
2. Mr.Baturov L.T.

**Ministry of Ecology and Bioresources
of the Republic of Kazakhstan**

1. Mr.Eidinov Yu.I.
2. Mr.Sinev L.A.

**Committee on Foreign Capital Utilization
under the Ministry of Finance
of the Republic of Kazakhstan**

1. Ms.Kakimzhanova Zh.A.
2. Mr.Musin V.A.
3. Mr.Akhmetov A.

“Ridder Invest” company

1. Mr.Pervykh B.I.
2. Mr.Shumenov I.E.
3. Mr.Ibragimov Ya.M.

“Kazmetal” company

1. Mr.Takezhanov M.I.
2. Mr. Medeuov Ch.K.

“A.Postovalov and Co.” company

1. Mr. Zharkenov M.I.
2. Ms. Bolatbaeva K.K.

Kazakh National Technical University

1. Mr. Lisenkov A.A.

Kazakh Center on Complex Utilization of Mineral Raw Materials

1. Mr. Zharmenov A.A.
2. Mr. Romanov G.A.
3. Ms.Terlikbaeva A.Zh.

**State Scientific and Production Amalgamation
“KAZMEKHANOB”**

1. Mr. Kletz A.K.
2. Mr.Kosmukhambetov A.R.

Japanese side:

JICA Survey Team

1. Mr. A. Matsuura
2. Mr. T. Mayama
3. Mr. K. Otani
4. Mr. H. Komatsu
5. Mr. A. Takata
6. Mr. H. Matano
7. Mr. E. Nomura
8. Mr. F. Koda
9. Mr. A. Abdurahman

Representatives of Japanese companies in Almaty

1. "Itochu"
2. "Mitsubishi"
3. "Sumitomo"
4. "Mitsui"
5. "Nissho Iwai"
6. "Kinsho Mataichi"
7. "Marubeni"
8. "Hitachi"

ANNEX - 4

Program of the Seminar

1. Date: 23d of October 1996 (Wednesday)
Time: 09:30 (AM) - 19:00 (PM)
2. Place: MITI Meeting Room
3. Master of Ceremony: Mr.V.K.Kulsartov, Member of the Steering Committee
4. Program:

09:30-10:00	Greeting speech of Kazakhstan side and Mr.Matsuura
10:00-10:40	Progress of Japan mining policy (Mr.Mayama)
10:40-11:00	Discussion
11:00-11:40	Environmental control standards (Mr.Takata)
11:40-12:00	Discussion
12:00-12:40	Present situation and future task of Cu-Pb-Zn Smelting in Japan (Mr.Nomura)
12:40-13:00	Discussion
13:00-14:00	Lunch time
14:00-14:40	Formation and management of competitive resources of useful minerals in market economy conditions (Mr. A.A.Lisenkov)
14:40-15:00	Discussion
15:00-15:20	Coffee break
15:20-16:00	Demand outlook of non-ferrous metals in the world and trend of non-ferrous metals industry in Kazakhstan (Mr.Komatsu)
16:00-16:20	Discussion
16:20-17:00	International financial system, its evaluation method and process (Mr.Matano)
17:00-17:20	Discussion
17:20-18:00	Regarding the operation of industrial enterprises to be transfered to trust management (Mr.T.U.Kambakov)
18:00-18:20	Discussion
18:20-19:00	Industrial information system (Mr.Koda) Closing speech of Seminar (Mr. A.K.Tilga)

MINUTES OF MEETING

AGREED UPON BETWEEN

THE STEERING COMMITTEE
OF THE REPUBLIC OF KAZAKHSTAN

AND

THE SURVEY TEAM OF
THE JAPAN INTERNATIONAL COOPERATION AGENCY

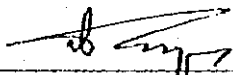
FOR

THE MASTER PLAN STUDY

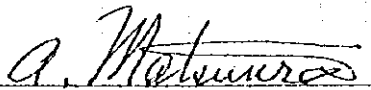
ON

PROMOTION OF NON-FERROUS METALS INDUSTRY
IN THE REPUBLIC OF KAZAKHSTAN

Almaty, January 24, 1997



Mr. M. Zh. Bitimbayev,
Vice-Chairman of the Steering
Committee, Deputy Minister
of Geology and Underground
Resources Preservation
of the Republic of Kazakhstan



Mr. Atsuo Matsuura,
Leader of the JICA
Survey Team

1. The Steering Committee Meeting was held at the venue of the Ministry of Industry and Trade on the day of 22nd of January, 1997, with respect to the draft final report of the Master Plan Study on the Promotion of the Non-ferrous Metals Industry in the Republic of Kazakhstan.

2. The Meeting was chaired by Mr. Murtazaev, First Deputy Minister of the Industry and Trade and was attended by the Kazakhstan members of the Steering Committee and the JICA Survey Team as listed in Annex-1. The program is also attached in Annex-2.

3. The JICA Survey Team submitted thirty (30) copies of the draft final report in English and thirty (30) copies of its summary in English and thirty (30) copies of its summary in Russian. The Survey Team made a presentation on the results of its investigation to date according to the draft final report. A vigorous discussion was made between the members of the Steering Committee and the JICA Survey Team.

4. The content of the draft final report and the presentation by the JICA Survey Team were accepted and consented by the members of the Steering Committee. However, further comments and requests, if any, will be transmitted to the JICA Survey Team not later than 5th of February, and will be taken into account in the final report.

5. It was agreed between the Kazakhstan Side and Japanese Side that the final report will be completed and submitted to the Steering Committee in March 1997.

6. The Kazakhstan Side expressed its intention to open the final report to public. The JICA Survey Team promised to transmit its intention to JICA for agreement.

7. The Kazakhstan Side expressed its wishes to create new projects on the basis of recommendations made in the final report.

The Steering Committee expressed deep gratitude to the Team for their efforts in preparing this draft final report. The Ministry of Industry and Trade promised to distribute the relevant ministries and to review the draft final report.

The Japanese Survey Team expressed its sincere appreciation for the cooperation by the Kazakhstan Side in the course of implementing this project.

In carrying out the Master Plan Study on Promotion of Non-ferrous Metals Industry described in this report, the Kazakhstan Side will make further in-depth study on it. In this connection, they requested the Japanese side to afford close cooperation in exchange of information and mutual communication.

In witness of the above mentioned matters, both sides signed the Minutes of the Meeting on the day of January, 24, 1997, and each side shall keep an authentic copy each of the Minutes of the Meeting.

Annex - 1 List of the Participants of the Steering Committee Meeting

Annex - 2 Program of the Steering Committee Meeting

ANNEX- 1

List of Participants of the Steering Committee Meeting
on 22nd of January 1997

Kazakhstan side:

- Mr. M.A.Murtazaev - Chairman of the Steering Committee,
First Deputy Minister of the Industry and Trade
of the Republic of Kazakhstan
- Mr. K.Z. Valiev - Member of the Steering Committee,
Chief of the Sector of Industry Enterprises
Reformation Department of Government Office of
the Republic of Kazakhstan
- Mr. V.K.Kulsartov - Member of the Steering Committee,
Head of Main Department on Industry Policy
and Modernization of Industry Production
Structure of the Ministry of Industry and Trade
of the Republic of Kazakhstan
- Mr. B.Ya.Sadchikov - Member of the Steering Committee,
Deputy Head of Main Department of Reformation
and Promotion of the Mining-Metallurgical
Complex of the Ministry of Industry and Trade of
the Republic of Kazakhstan
- Ms. Zh. Kakimzhanova - Head of Department of State Committee on
External Loans under the Ministry of Finance of
the Republic of Kazakhstan
- Mr. N.E. Raimbekov - Head of Metallurgical Department of the Ministry
of Economy of the Republic of Kazakhstan
(instead of the Member of the Steering
Committee, Head of the Main Department of
Microlevel Economy Ms. Sarmurzina R.G.)
- Mr. A.T.Shakirov - Deputy Head of Main Department of Reformation
and Promotion of the Mining-Metallurgical

**Complex of the Ministry of Industry and Trade
of the Republic of Kazakhstan**

- Mr. T.U. Kambakov - Deputy Head of Department on Market Relations
Promotion and Monitoring in the Industry of the
Ministry of Industry and Trade of the Republic of
Kazakhstan**
- Mr. S.K.Zhamanbaev - Chief Specialist of Main Department on Industry
Policy and Modernization of Industry Production
Structure of the Ministry of Industry and Trade
of the Republic of Kazakhstan**
- Ms. A.S. Zulkasheva - Chief Specialist of Main Department on Industry
Policy and Modernization of Industry Production
Structure of the Ministry of Industry and Trade
of the Republic of Kazakhstan**

Japanese side:

- Mr. A.Matsuura - Leader, Summarise**
- Mr. T.Mayama - Promotion Planning of Non-ferrous
Metals Industry**
- Mr. K.Otani - Corporate Management**
- Mr. H.Komatsu - Production Management**
- Mr. H.Matano - Financial Analysis**
- Mr. A.Hoshino - Management Project - (JICA)**

ANNEX - 2

Program of the Steering Committee Meeting

Date: 22nd of January 1997

Venue: Head Quarter, Ministry of Industry and Trade
of the Republic of Kazakhstan

10:00 - 10:15 Opening Note: Mr.Murtazaev M.A., Chairman

10:15 - 10:30 Introductory Note: Mr.Matsuura A., Leader of the JICA
Survey Team

10:30 - 13:00 Briefing of the Final Report and Discussion.

Chapter 1 and 2: Mr. Otani K., JICA Survey Team

13:00 - 14:30 Lunch

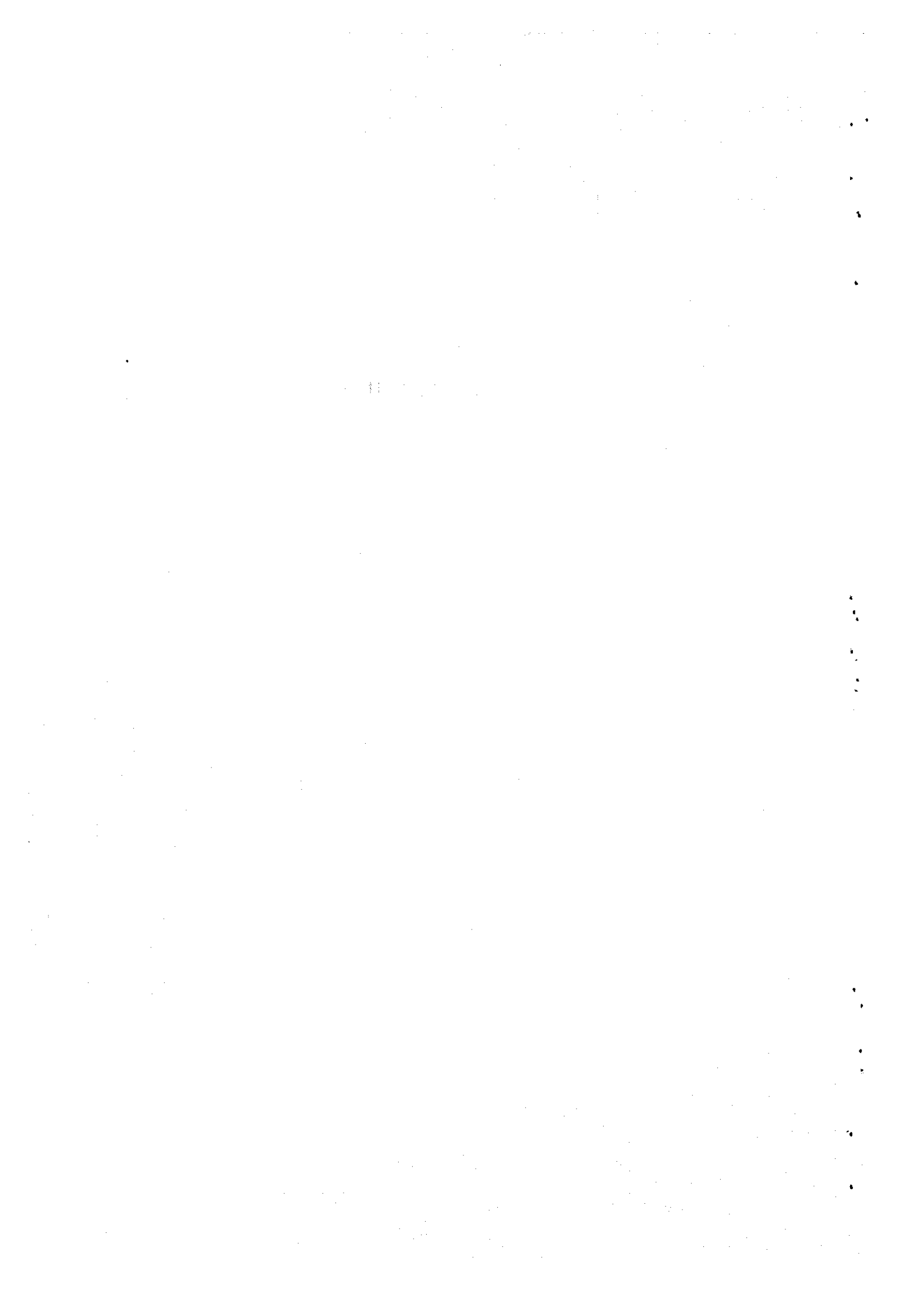
14:30 - 18:00 Continuation of the Briefing and Discussion

Chapter 3: Mr. Mayama T.
Mr. Matano H.
Mr. Matsuura A.,
JICA Survey Team

Chapter 4 and 5: Mr. Komatsu H.,
JICA Survey Team

18:00 - 18:10 Closing Note: Mr. Kulsartov V.K.,
Ministry of Industry and Trade
of the Republic of Kazakhstan

Ⅲ 資料リスト



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- 24) カザフスタン共和国原料政策コンセプト (案)
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- 25) 選鉱場建設を必要とするカザフスタン共和国の企業
- 26) カザフスタン共和国の経済的安全保障および独立のコンセプト (草案)
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- 27) カザフスタン共和国対外経済政策のコンセプト
1994年 カザフスタン共和国経済省付属経済・市場関係研究所
- 28) カザフスタン共和国の非鉄金属工業の現状
- 29) ウスチカメノゴルスク鉛-亜鉛コンビナート 紹介プロシエア (口)
- 30) チムケント鉛製錬所 紹介プロシエア (口)
- 31) ウスチカメノゴルスク鉛-亜鉛コンビナート組織図など (口)
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- 2) カザフスタン共和国における地下資源利用にかかるライセンス取得手続きに関する規定
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- 1) ECONOMICS OF ZINC SMELTING PRELIMINARY DATA SHEETS
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2) 資源経済学のすすめ 世界の鉱物資源を考える

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3) 現・近未来における銅の需給動向分析

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4) 産業別にみた中期需要予測 (Ⅱ銅・鉛・亜鉛)

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4. 鉱害、環境

1) 平成5年度 資源情報協力事業(指導・コンサルティング業務) 報告書

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発展途上国における環境保全対策調査報告書

鉱山・製錬所環境調査 カザフスタン共和国

平成6年3月 財団法人 国際鉱物資源開発協力協会

3) 平成6年度総合開発計画調査

発展途上国における環境保全対策調査報告書

鉱山・製錬所環境調査 カザフスタン共和国

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4)~6) 水質基準、排水基準関連資料 1994,1995

7) カザフスタン共和国に存在する都市浄水施設、都市及び貯水地の廃水量、それらのエコシステムに与える影響に関する情報

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5. 援助、技術協力

1) Kazakhstan Technical Assistance Requirements

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2) わが国の中央アジア諸国に対する総合開発協力プラン

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平成6年3月 E C F A 開発研究所

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1) THE INVESTMENT PROGRAMME

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2)THE ESTABLISHMENT OF JOINT VENTURES,CREATED WITH THE ASSOCIATION
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3)Zhairem Atasu Free Economic Zone INVITATION TO COLLABORATION

4)REPORT:THE GOVERNMENT OF KAZAKHSTAN AND UNITED NATIONS JOINT
MISSIONSELECTED ENTERPRISES

ALMATY May,1,1995 UNITED NATIONS DEVELOPMENT PROGRAMME

5)KAZAKHSTAN MINERAL INVESTMENT OPPORTUNITIES

OCTOBER, 1994 The Ministry of Geology and Preservation of
Underground Resources of the Republic of
Kazakhstan 1994

6)SUMMARY of Projects and Programme aimed at solving the ecological
problems of Kazakhstan AKMOLINSK REGION

No projects and programme that would require foreign investments.

7)Kazakhstan Investment opportunities in the energy sector

1995 FINANCIAL TIMES MANAGEMENT REPOTRS

8) カザフスタン共和国における鉱物原料基盤の状態

—地下資源（固形有用鉱物）開発のための投資計画—

9) 報告 カザフスタン採鉱・金属工業複合体の今日と明日

10) 中央アジアの旧ソビエト諸国の投資法 第3回 カザフスタン

11) 税体系

7. 鉱山評価等

1)Economics Evaluation and Investment Decision Methods

Fifth Edition 1993

INVESTMENT EVALUATIONS COOPORATION

2)Bureau of Mines Cost Estimating System Handbook

Bureau of Mines Information Circular / 1987

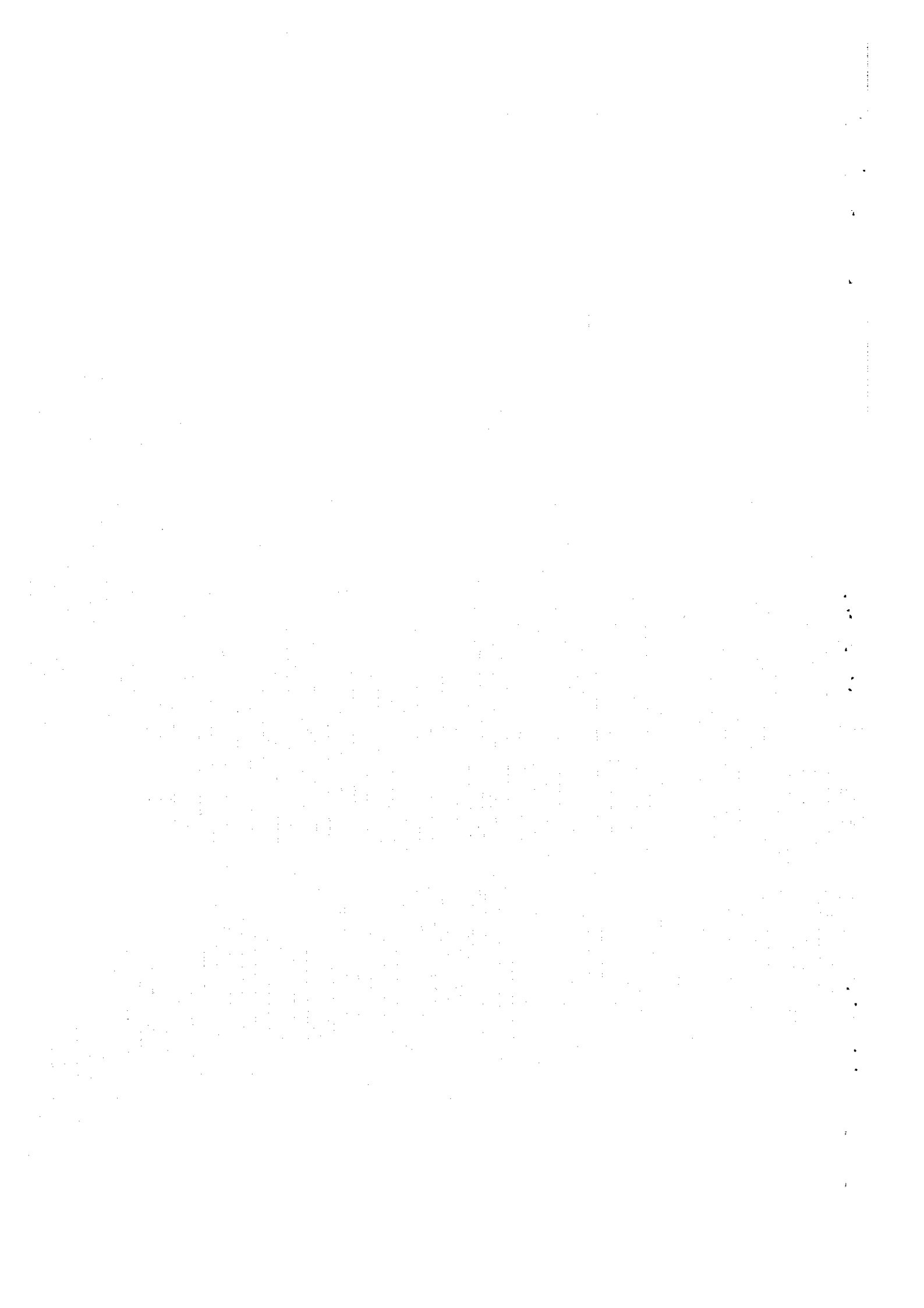
UNITED STATES DEPARTMENT OF THE INTERIOR

資料

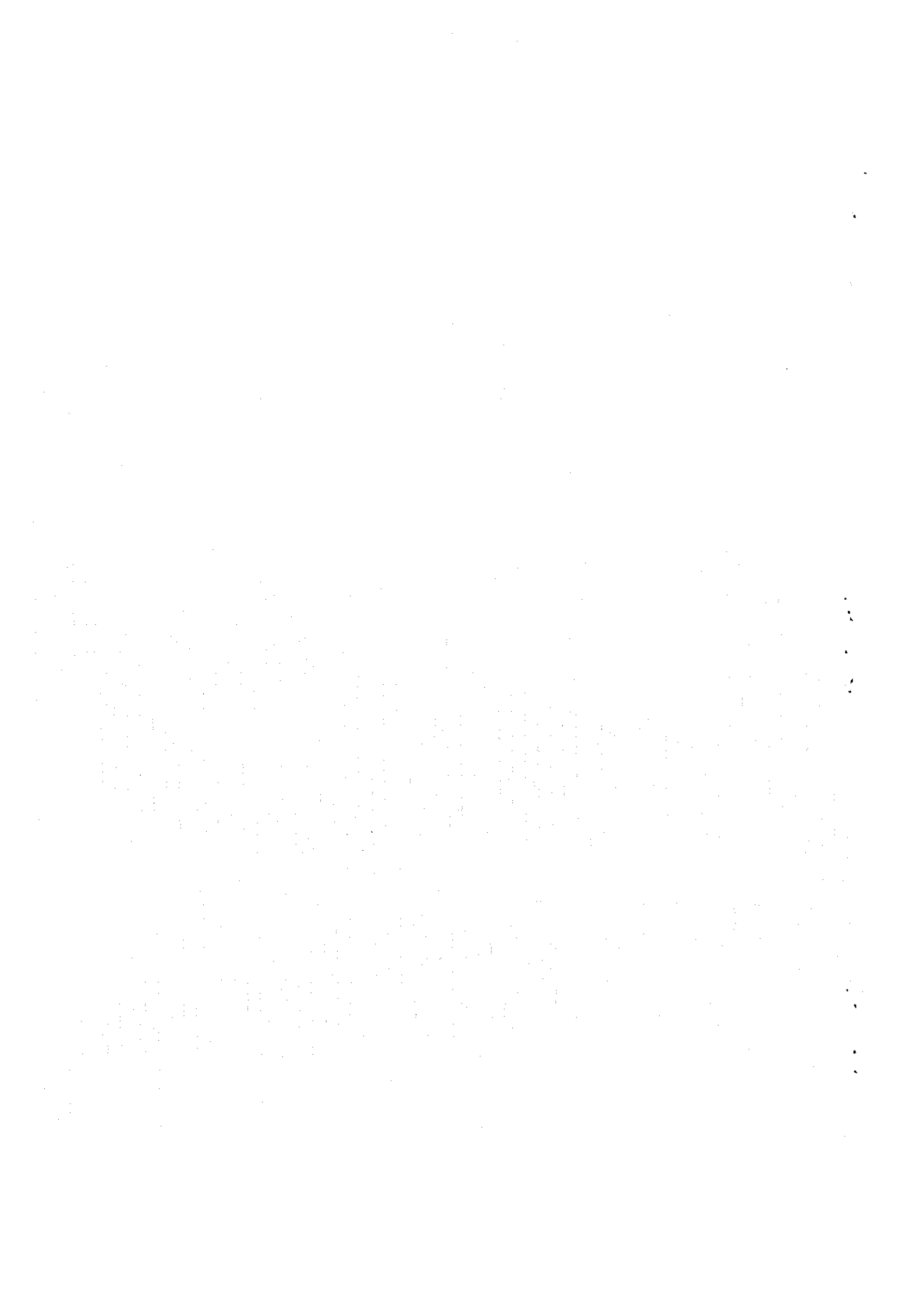
- 1) Foreign economic activity of the Republic of the Kazakhstan for 8 months period.
- 2) The Investment Programme for Geological Investigations and Development of hard rock mineral deposit(Synopsis)
- 3) Joint-Stock Company "Ustkamenogorsk Pb-Zn Combine"
- 4) The Decree of the President of the Republic of Kazakhstan about the structure of the Government of the Republic of Kazakhstan
- 5) The Decree of the President of the Republic of Kazakhstan about the improvement of structure of the central executive bodies of the Republic of Kazakhstan
- 6) Reorganization matters of the state holding and Joint-Stock Companies
- 7) Average prices for 1 tonne of the pure metal and metals in concentrates as of 1.09.95
- 8) The programme of state investment priorities of the Republic of the Kazakhstan
- 9) Activity of JSC "Kazdorbank"
- 10) Geological exploration organizations, operating under the Ministry of Geology and Preservation of Underground Resources and the Ministry of Industry of Trade of the Republic of Kazakhstan
- 11) Attachment 2-Information on working out, coordination and approval of the normative and methodical documents as of 15th of November 1995
- 12) Decree of the President of the Republic of Kazakhstan on the Bank and Bank Activities in the Republic of Kazakhstan
- 13) Decree of the President of the Republic of Kazakhstan on Formation of the Committee on Foreign Capital Utilization under the Cabinet of the Republic of Kazakhstan
- 14) Kazakhstan's Law on trademarks, Servicemarks and appellations of origin, August 5, 1992
- 15) Ministry of Economy of the Republic of Kazakhstan Scientific and Research Institute of the Economy and market relations under Ministry of Economy of the Republic of Kazakhstan "Conception of the raw materials policy of the Kazakhstan" approved by the Decree of the Cabinet of Ministers of the Republic of Kazakhstan dated 7th of December 1994
- 16) The projects of Non-precious metals exploration of the Republic of Kazakhstan
- 17) Implementation of Production plan of most important kinds of goods for period of December from the beginning of 1994 on "Kazpolichmetal" concerns enterprises
- 18) Kazakhstan's Patent Law
- 19) Methodical recommendations on geological and economic assessment of solid mineral deposit
- 20) Production of commercial products by non-ferrous metallurgical enterprises for 10 months of 1995
- 21) Results of work of national Joint-Stock Company "Kazakhstan Tusti mataldary" enterprises during 1994 and 1 quarter of 1995 and Production Plan for 1995 on ore and concentration and metallurgical repartitions
- 22) Ministry of Economy and Ministry of Industry of Trade of the Republic of Kazakhstan Draft "Coception of the middle-term industrial policy of the Republic of Kazakhstan"

- 23) Mining and metallurgical complex of Kazakhstan; Present state and problems
- 24) Non-ferrous metals industry of Kazakhstan fragments of history, results and tendencies
- 25) UNDP "Report; The Government of Kazakhstan and United Nations Joint Mission to selected enterprises" Almaty May 1, 1995.
- 26) The Investment Programme for Hydrogeological, Engineering-geological Geological Researches.
- 27) Decree of the President of the Republic of Kazakhstan on the central Bank of Kazakhstan
- 28) Conception on management and regulation of use and protection of underground resources in the Republic of Kazakhstan
- 29) Conception on stimulation of investment attraction to the minerals prospecting and extraction of the Republic of Kazakhstan
- 30) The role of mineral raw materials complex in the economy of the Republic of Kazakhstan and brief survey of mineral raw materials base development and geological study of the Republic's territory
- 31) Mineral resources of Kazakhstan, No.1-94, No.2-94 (December), No.2(4) '95-June, No.3(5) September, 1995
- 32) Legislation and Normative Acts on use of underground resources of the Republic of Kazakhstan
- 33) Land legislation of the Republic of Kazakhstan
- 34) Oil and Gas of Kazakhstan
- 35) Instruction on calculation procedure and payment of the value-added tax
- 36) Labor Agreement (Contract)
- 37) Central Asia Monitor-Monthly Economic Bulletin, 6 August 1995, Almaty
- 38) Eurasian Community-Economy, Politics, Security, 4-5, 1995
- 39) IMF Economics Reviews, 18-1994
- 40) Direct foreign investment in the Republic of Kazakhstan
- 41) Finances of Kazakhstan-Budget, Financing and Production, Securities 4-95
- 42) Statistical Bulletin-State Committee of the Republic of Kazakhstan on Statistics and analysis No.1, 2/95
- 43) National Bank of the Republic of Kazakhstan Economic Review-September 1996, 6 issue
Statistical Bulletin No.9(10) September 1995 National Bank Herald-31 October 9 95,
No.12 (12)
- 44) External Economic Influence in the Republic of Kazakhstan
- 45) International relations in Kazakhstan ethnic aspect of training policy
- 46) World Bank-Kazakhstan Economics Report, Report No.12856-KZ (in two volumes)
Volume I: Main Report, July 7, 1994, Volume II: Annexes July 7, 1994
- 47) The Constitution of the Republic of Kazakhstan
- 48) Staff Appraisal Report, the Republic of Kazakhstan, Financial and enterprises development project
- 49) Kazakhstan today: Political parties world

- 50)National Joint-Stock Company"Kazakhstan Tusti Metaldary"
- 51)Programme of actions of the Government on deeping the reforms for 1996-1998
- 52)Doing Business in Kazakhstan
- 53)About the taxes and other obligatory budget payments
- 54)The map of automobil roads of the Republic of Kazakhstan Scale 1:3,500, 000
- 55)Ministry of Finance of the Republic of Kazakhstan The Normative Acts-Special Issue on Financing,Taxes,Accounting System, Insurance matters Official edition 2-3,4 1995
- 56)World Bank-Profile of Donor
- 57)Information about European Bank for Reconstruction and Development (EBRD)-Profile of Donor
- 58)Combined table of projects on minerals exploration in the Republic of Kazakhstan
- 59)Information about estimated cost of some constructed enterprises of non-ferrous metals industry of Kazakhstan
- 60)Collection of legislative acts,issue 11
- 61)Some market aspect on the activities of Kazakhstan non-ferrous metal companies
- 62)Decree of the president of the Republic of Kazakhstan on the bank and bank activities in the Republic of Kazakhstan
- 63)Decree of the president of the Republic of Kazakhstan on the central bank of Kazakhstan
- 64) カザフスタン共和国工業商業省機構図
- 65) カザフスタン共和国工業商業省機械製造局傘下企業図
- 66) カザフスタン共和国工業商業省鉱山冶金コンプレックス局傘下企業図
- 67) カザフスタン共和国工業商業省・職員名簿など
- 68) 燃料、エネルギーコスト推移
- 69) カズハノーバー REPORT
- 70)Focus:Kazakhstan Project Approvals Process in Kazakhstan
- 71) 研究テーマ一覧 1993年、1994年
- 72) 運賃
- 73)1994年国家統計委員会統計資料一覧
- 74) 地質省組織図
- 75) M I T I 組織図
- 76) 国営株式会社「アルティナルマス」の組織図
- 77) カザフスタンの鉱業関係の意志決定機関



IV 現場調査写真



Appendix IV
Site Survey
Photographs



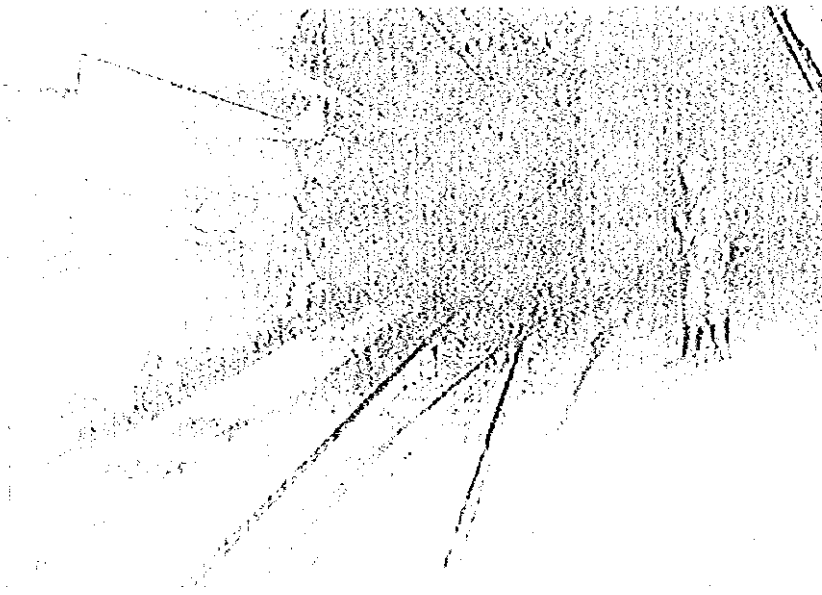
Meeting with Steering Committee



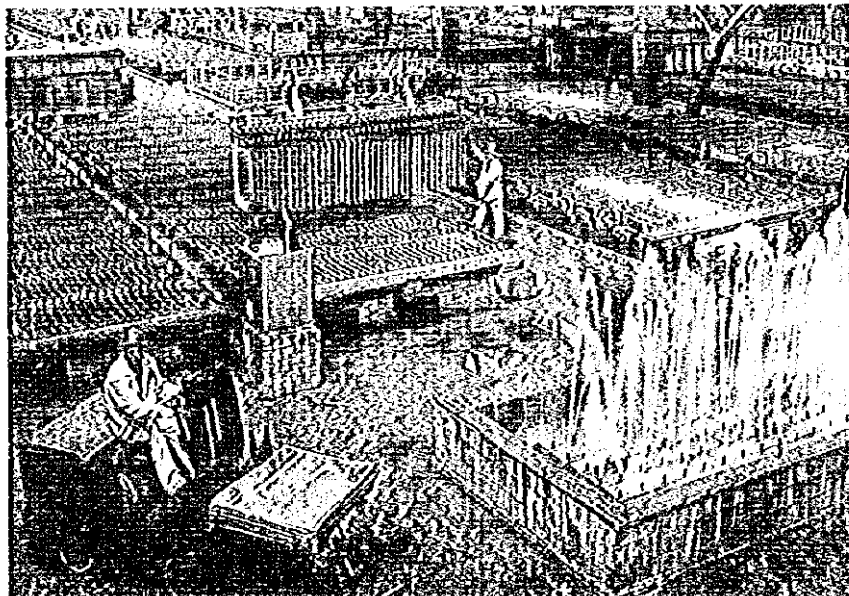
Ditto (Survey Member)



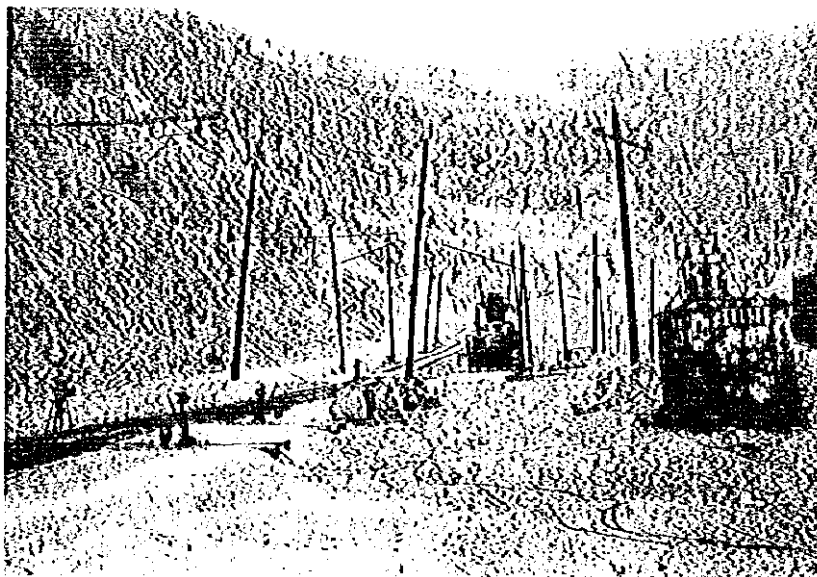
Exchange of Minutes of Meeting(No.5 Site Survey)



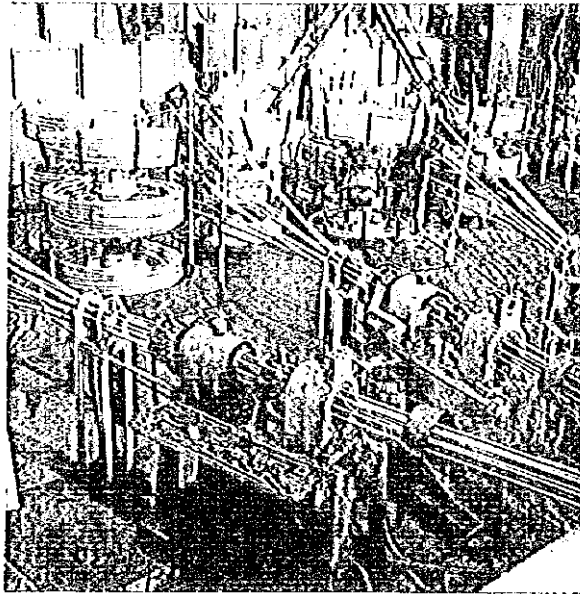
JSC "Zhezkazgantsvetmet" East Mine



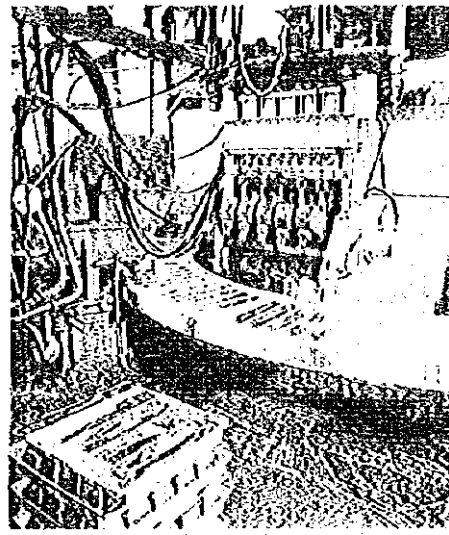
JSC "Zhezkazgantsvetmet" Copper Smelter (Copper Tank House)



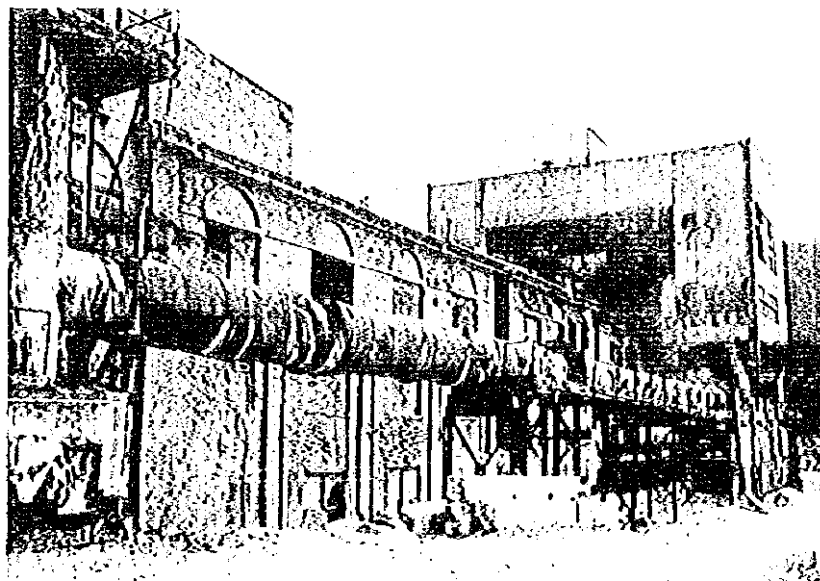
JSC "Balkhashmed" Kounrad Mine



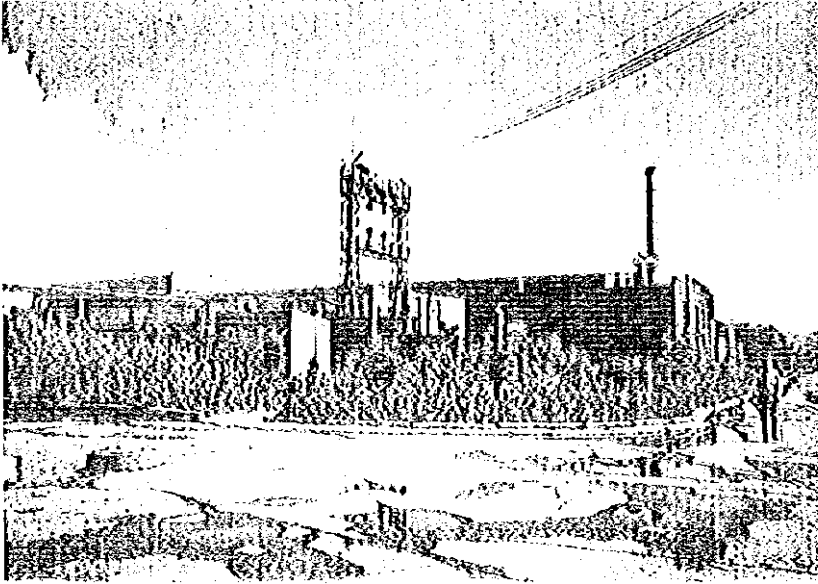
JSC "Balkhashmed" Copper Processing Plant



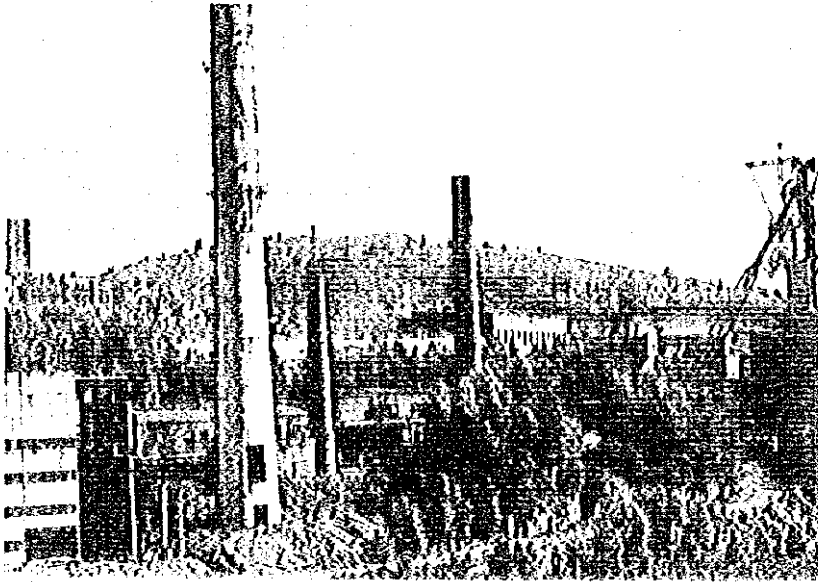
JSC "UK Pb-Zn Combine" Lead Casting



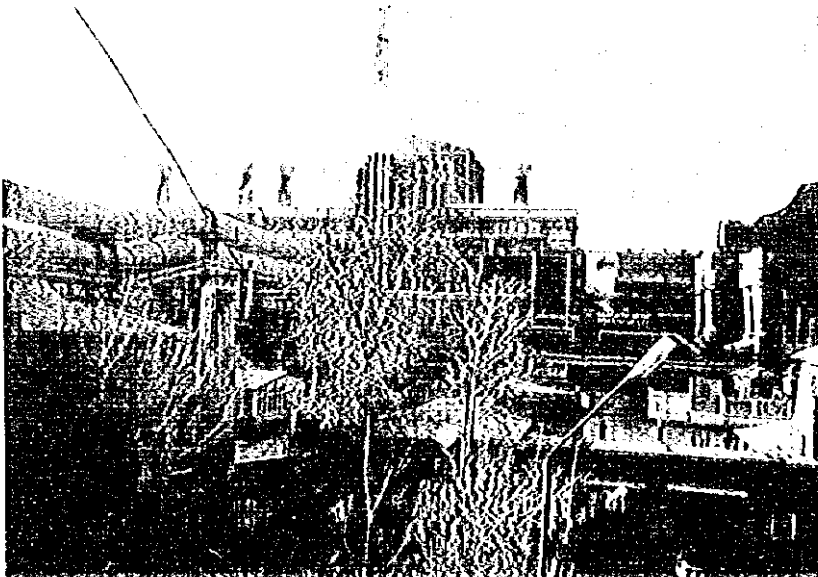
JSC "Itysk Copper Smelter" Copper Smelter (KIVCET)



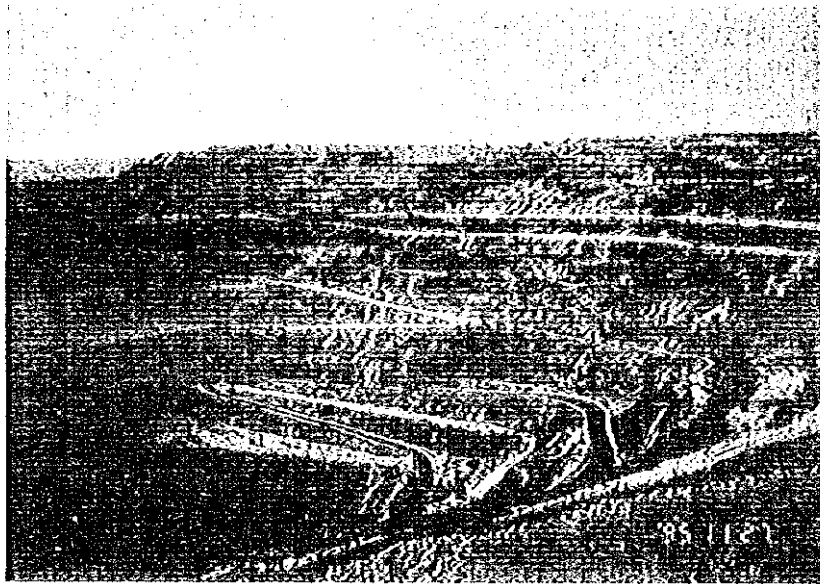
JSC "Leninogorsk PC" Zn Refinery



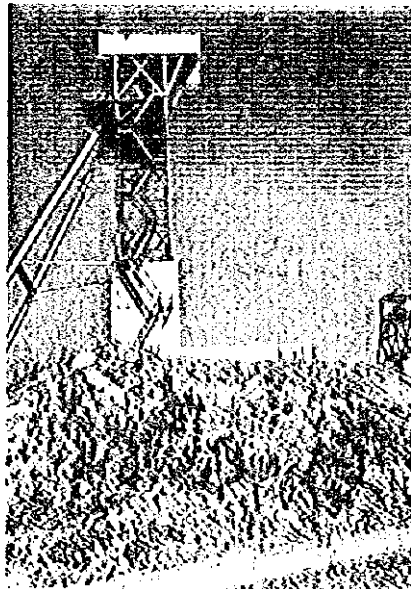
JSC "Leninogorsk PC" Tishinskoye Mine Surface Facility
(Shaft,Boiler,Heavy Liquid Separation Plant)



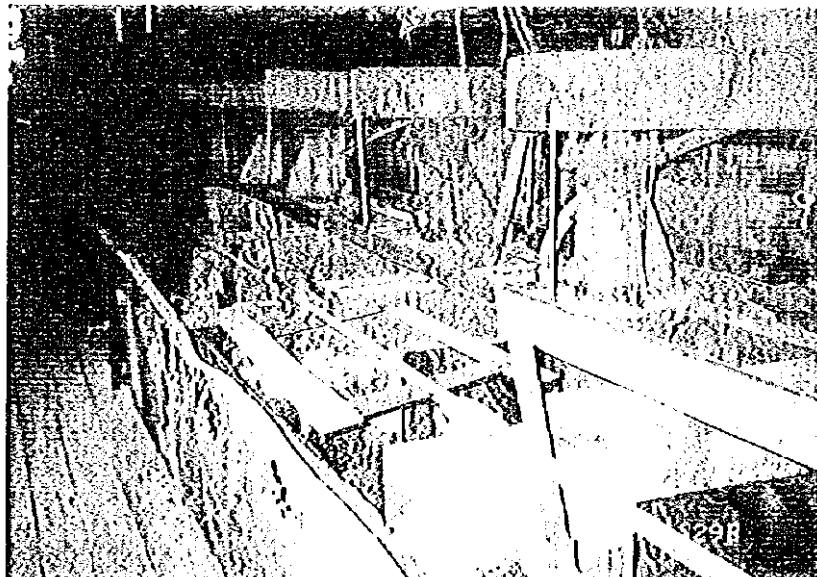
JSC "Shymkent Lead Plant" Lead Smelter



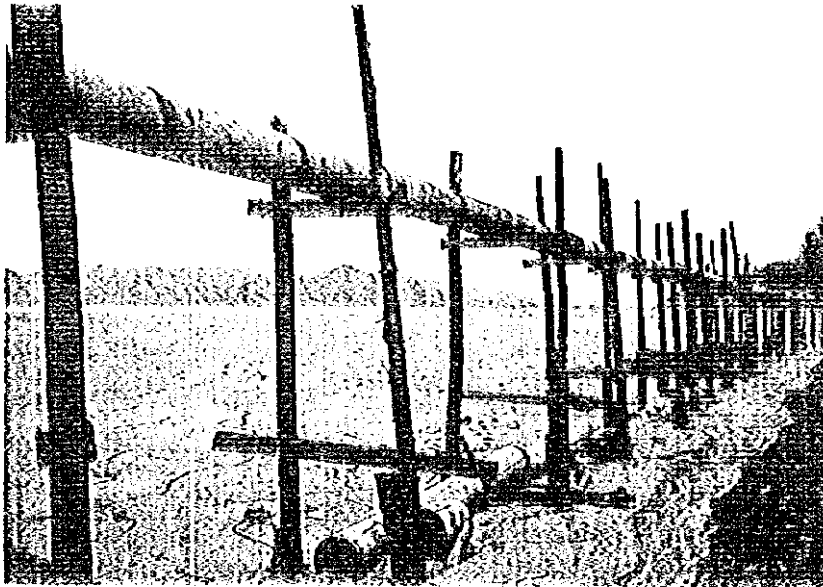
JSC "EKChC" Nicolaevskoye Mine



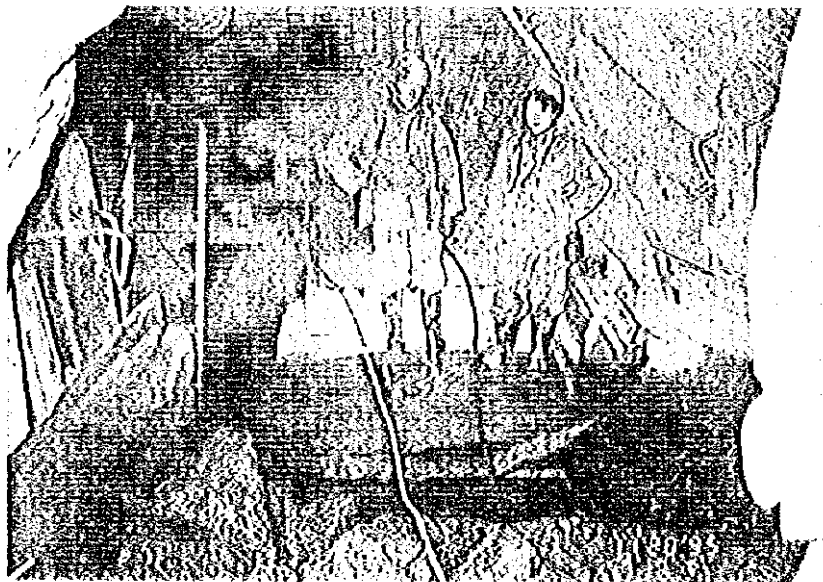
JSC "Zyryanovsk Lead Combine" Maleevskoye Mine (Shaft)



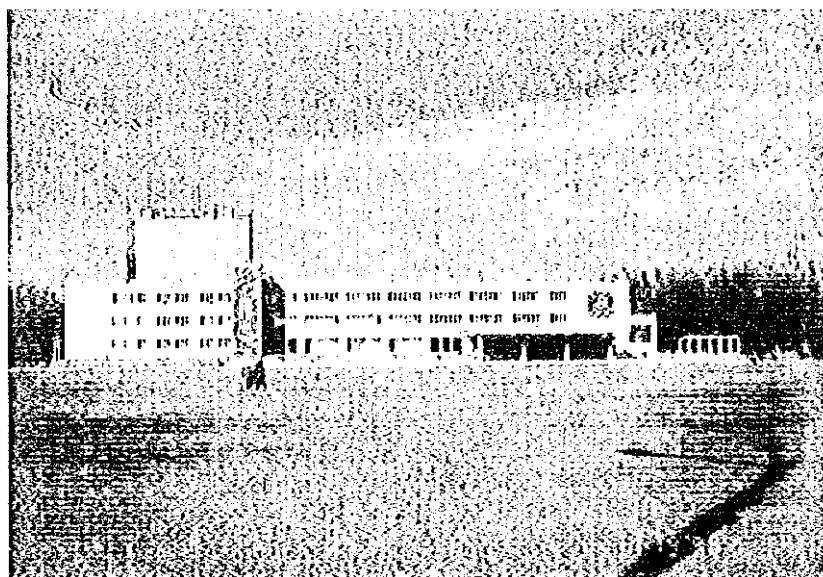
JSC "Zyryanovsk Lead Combine" Concentrator (Flotator)



JSC "Ittysh PC" Tailing Dam



JSC "Achpolymetal" Glubokiy Mine (Scraper)



JSC "Achpolymetal" Culture Hall in Kentau