



8-1(1) プロGRESSワークショッププログラム
JICA Mining Master Plan Study Progress Workshop



- From State Ownership to Private Sector Management -

May 25, 2007 10:00-14:00 at "Nikola Tesla Conference Room"
Kneza Milosa 9, Belgrade
Tel : 011-3230-067

- | | | |
|---|--|--------|
| 1. Greeting | <i>His Excellency, Dr. A. Popovic, Minister of Energy and Mining</i> | 5 min |
| | <i>His Excellency, Prof. Dr. Miladin Avramov,</i> | |
| | <i>General Secretary Ministry of Environmental Protection</i> | 5 min |
| 2. Support for Serbia from the Japanese Government | | |
| | <i>His Excellency, Mr. T. Nagai, Ambassador, Embassy of Japan</i> | 5 min |
| 3. JICA's Balkan Policy | | |
| | <i>Mr. M. Shikano, Resident Representative, JICA Balkan Office</i> | 5 min |
| 4. The World Bank's Role in the Serbian Mining Industry and Future Outlook | | |
| | <i>Ms. C. Jungr, Country Manager, World Bank</i> | 15 min |
| Coffee Break | | 15 min |
| <u>Part 1: Correspondence to the Changing Climate of Mining Industry</u> | | |
| 5. The Mineral Resources and Mining Industry of Serbia | | |
| | <i>Mr. Z. Teodorovic, Head of Mining and Geology Division, Ministry of Energy and Mining</i> | 10 min |
| 6. The Serbian Mining Sector and the Changing Global Mining Industry | | |
| | <i>Mr. Y. Nishikawa, JICA Team Leader</i> | 20 min |
| 7. Issues with Adopting EU Environmental Standards | | |
| | <i>Ms. S. Kuzmanovic, Head of Section for Geology, Ministry of Environmental Protection</i> | 20 min |
| 8. Recent Status of Research in the Mining Industry and Future Outlook | | |
| | <i>Prof. Dr. V. Cokorilo, Faculty of Mining and Geology, Belgrade University</i> | 20 min |
| 9. Issues with Mine Management after Privatization | | |
| | <i>Mr. D. Vukobratovic, President, Rudnik</i> | 20 min |
| Discussion | | 15 min |
| Coffee Break | | 15 min |
| <u>Part 2: Issues of Various Areas in the Mining Industry and Ways to Resolve Them</u> | | |
| 10. Serbian Mineral Resources Potential and Exploration Perspectives | | |
| | <i>Mr. M. Marutani, Geological Expert, JICA Team</i> | 10 min |
| 11. Points of Competitiveness and Reform for Underground Mines | | |
| | <i>Mr. K. Shingu, Mining Expert, JICA Team</i> | 10 min |
| 12. Tailings: 1. Prevention of Environmental Pollution and 2. Reworking | | |
| | <i>Mr. H. Ohki, Mineral Processing Expert, JICA Team</i> | 10 min |
| 13. Creating an Environmentally-friendly Smelting Plant | | |
| | <i>Mr. S. Muto, Metallurgical Expert, JICA Team</i> | 10 min |
| 14. Strategy for GIS Database | | |
| | <i>Dr. K. Wada, GIS Expert, JICA Team</i> | 10 min |
| Discussion | | 15 min |
| 15. Expectations for the Master Plan | | |
| | <i>Mr. Z. Teodorovic, Head of Mining and Geology Division, Ministry of Energy and Mining</i> | 5 min |

8-1(2) プログレスワークショップの概要

1. テーマ

国営企業から民間企業への鉱業セクター管理

2. 日時

5月25日 10:00～15:00

ニコラテスラ会議場

3. 出席者

- エネルギー鉱山省大臣、日本大使、環境保全省副大臣、JICA 所長、世銀セルビア事務所代表
- エネルギー鉱山省、環境保全省、地質調査所、ベオグラード大学、民営化庁、投資促進庁、鉱業研究所等
- 世銀、RTB Bor、Zorka 製錬所、Grot 鉱山、Rudnik 鉱山他鉱山民間企業

計 94 人

4. 第 1 部主要スピーチ内容(詳細は別紙ワークショップ資料集参照)

(1) エネルギー鉱業省大臣

Minister of Mining and Geology, Dr A. Popovic, welcome addressed the workshop informing about the recent intensively cooperation in the field of mining, geology and environment between governments of Japan and Serbia. That cooperation includes both visit of JICA expert in Serbia during 2004 and 2005 and a great number of civil servants from Serbia attended different types of training seminars and workshops in Japan that are organized by JICA. By such cooperation as result the Study for Master Plan for Promotion of Mining Industry in Serbia has been prepared. Study is signed by the Ministry of Energy and Mining RS, The Ministry of Science and Environmental Protection RS and JICA. Duration of the Study is 15 months.

(2) 環境保全省

General Secretary of the Ministry of Environment RS welcomed the implementation of the Master Plan for promotion of mining industry in Serbia, as a very important project.

(3) 日本大使

Ambassador of Japan in Belgrade, Mr. T. Nagai, has informed about the Project that is funded by Government of Japan and its cost is approx. 1,5 million US dollars. Also, he highlighted the support from the Government of Japan to Serbia in different fields and was in amount approx 190 million US dollars. He said that the mining sector should take a special place in terms of the future investment.

(4) JICA 所長

Resident representative of JICA Balkan Office, Mr. M.Shikano, gave a brief overview about JICA Balkan Policy and cooperation in the Balkan area. He informed that this is the first

Development Study that is implementing in Serbia. JICA Balkan office performs technical cooperation issues in 6 countries of Western Balkan. Technical cooperation is based on the principle of Economic Development related to private sector development and Environment, as a priority field of cooperation in Serbia. JICA Balkan office in the previous time was located in Vienna. Since October 2006 the office was removed to Belgrade. He emphasized the importance of the Study for Master Plan for Promotion of Mining Industry in Serbia from the aspect of establishing and developing cooperation in mining sector and the first development study as well as from the aspect of economic development and environmental protection in Serbia.

(5) 世銀代表

Country Manager, World Bank, Ms. C. Jungr, said a few words about potential of the mining sector in Serbia. She explained that less than 2% of Serbia's GDP derived from mining metals and energy resources, while worldwide between 2-8% comes from solid mineral production and from energy between 8-12%. Ms Jungr stressed that is necessary to improve sector governance in order to attract foreign investors. She pointed out that is important to go with restructure the traditional mining sector, development of mining sector policy and its linkages with other strategies, as well as revise the legal and regulatory system for mining sector. She informed that the World Bank role will be in assistance in the preparation of Mineral Sector Policy and legislative and regulatory framework, making an effort in the process of privatization, as well as in the Bor Project from the environmental and social point of view.

5. 討議での主要質問事項

- 探査データ特に鉱量について、地質研究所の所有する数値と相違する。数値への精度を確認してほしい。
- 環境コスト、環境に関する税金と外国ではどう扱われているのか。現在各鉱山とも環境コストは不明
- 民間鉱山会社に技術指導をしてもらう制度がない。必要である
- 鉱石の副産物やスラグ中の有用金属の利用はしていくことを検討すべきである

6. ワークショップへの各機関のコメント

- セルビア鉱業の役割、現在の転換期にいる状況など全体像の理解に結びついた(MEM)
- セルビア鉱業の改革すべき問題点が抽出され、市場経済化での鉱業管理のあり方が把握できた(鉱山会社)
- JICA MP プロジェクトの内容、調査の役割を理解した(民営化庁)
- セルビアにとっての鉱業の価値、改革が必要であることが判った(ジャーナリスト)

8-1(3) プロGRESSワークショップ写真



ワークショップ会場”Nikola Tesla 会議室”入り口



受付風景



開始前の懇談風景。右より反時計回りに JICA 鹿野所長、長井日本大使、鉱業省大臣、環境保護省次官、世銀カントリーマネージャー、世銀ローカルスタッフ



セミナー開始時風景。左より鉱業省大臣、通訳、鉱業省テオドロビッチ氏、環境保護省、長井大使、世銀カントリーマネージャー、JICA 鹿野所長、西川団長



会場風景。100 席用意してあった座席が満席になった



セミナー進行役を務めた鉱業省テオドロビッチ氏



鉱業エネルギー省大臣による開催挨拶



環境保護省次官によるスピーチ



長井日本大使によるスピーチ



バルカン地域における JICA の政策についてスピーチする JICA バルカン事務所鹿野所長



セルビアでの世銀の役割について説明する世銀カントリーマネージャー



1st セッション前のコーヒープレーク



セルビアの鉱物資源、鉱業についてプレゼンする
テオドロビッチ氏



西川団長によるプレゼン
セルビア鉱業と世界の鉱業の変化



民間企業を代表してプレゼンする”Rudnik 鉱山社長”



セルビアの鉱物資源ポテンシャルについて発表する
丸谷団員



ディスカッション①
各発表に対し活発な議論がなされた



ディスカッション②
配布資料に基づき質問する参加者



Општина Врање



Regional Workshop for Mining Activities

- Relationship between Mines and Local Communities -

October 16, 2007 12:00-16:00 at Vranje Municipality Conference Hall
 Petog Kongresa Street, 1, 17500 Vranje
 Tel: 017-402-305

12:00~13:15

- | | | |
|--|---|--------|
| 1. Greeting | <i>Mr. Stojcic, Mayor of Vranje</i> | 5 min |
| 2. Importance of the Mining Industry to Local Communities | <i>Mr Z.Teodorovic, Head of Dept. for Mining and Geology,
Ministry of Energy and Mining</i> | 10 min |
| 3. Support for Local Community Development | <i>His Excellency, Mr. T. Nagai, Ambassador, Embassy of Japan</i> | 15 min |
| 4. Role of JICA in Local Community Development | <i>Mr. M. Shikano, Resident Representative, JICA Balkan Office</i> | 15 min |
| 5. Environmental Protection Policy for Local Area | <i>Mr. Boljanic Momir, Adviser, Ministry of Environmental Protection</i> | 15 min |
| Coffee Break | | 15 min |

13:00~13:15

Part 1: Role of the Mining Industry in the Local Economy

- | | | |
|--|---|---------|
| 6. Relationship between Mining Activities and the Local Community | <i>Mr. Y. Nishikawa, JICA Team Leader</i> | 20 min* |
| 7. Importance of the Grot Mine to Local Communities | <i>Mr. Nikola Jakimov, Technical Director, Grot Mine</i> | 15 min |
| 8. Environmental Protection in Mining Industries | <i>Mr. M. Murata, Environmental Expert, JICA Team</i> | 20 min* |
| 9. Mineral Resources Potentiality in Vranje area | <i>Mr. M. Marutani, Geological Expert Expert, JICA Team</i> | 20 min* |
| Coffee Break | | 15 min |

14:30~14:45

Part 2: Discussion

- | | | |
|--|--------------------------------------|--------|
| Discussion | | 30 min |
| ➤ Local Communities Development | | |
| ➤ Environmental Protection and Monitoring Data | | |
| ➤ Relationship between Mines and Local Society | | |
| 10. Management to Mining Activities by Government | <i>Ministry of Energy and Mining</i> | 15 min |

N.B. * includes time for translation into Serbian language.

8-2(2) ローカルソサエティワークショップ概要

1. テーマ

『鉱山と地域社会との関係』

2. 時間

2007年10月16日 (火) 12:00～16:00

ヴラニェ市庁舎 カンファレンス・ホールにて

3. 出席者

* ヴラニェ市長、日本大使、JICA所長、エネルギー鉱業省鉱山地質部局長、
環境保全省代表

* エネルギー鉱業省、環境保全省

* Grot 鉱山、Bor 鉱山、Vranje 民間企業

計 80人

4. 第一部 主要スピーチ内容（詳細は別紙ワークショップ資料集参照）

(1) ヴラニェ市長

Mr. Stojcic, Mayor of Vranje, addressed Japanese and Serbian geologists and mining experts, as well as all the participants in the workshop emphasizing the importance of this event being held in Vranje. Vranje region has considerable mineral resources. It is especially rich in lead, zinc and zeolite. There are factories for the ore exploitation. We hope to taking the opportunity for economic development of this area supporting the cooperation between Japanese agency and Serbian government which are working on the Master Plan for Promotion of Mining Industry in Serbia.

(2) 日本大使

H. E. Mr. Tadashi Nagai, Ambassador of Japan in Serbia, gave a brief overview about Japan ODA (Official Development Assistance) in supporting Serbia. ODA has been divided in four groups according to the type of support as follows: emergency, development, technical cooperation and grassroots. The support was in all 197 million euro for a previous period.

(3) JICA 所長

Mr. Masao Shikano, Resident Representative of JICA Balkan Office, explained the role of JICA in Local Community Development from the aspect of “human security”. He emphasized that in order to have a good developed local society we must focus on the individual, single person within the group who has to be perfectly protected. When introduce a new program or a project, JICA established seven principles for the security of social community to be applied. One of the principles is “cooperation with the government as well as cooperation with the local community” in process of fulfillment of viable development. He also highlighted the importance of

the environmental protection in local area.

(4) エネルギー鉱業省鉱山地質部局長

Mr. Zoran Teodorovic, Head of Department for Mining and Geology from the Ministry of Energy and Mining of Serbia, said a few words about the importance of Mining industry and its development for local communities.

5. 討議での主な内容

* Mr. Vasiljević from the "Grot" mine asked about the source for potential resources of the Blagodac area. Mr. Marutani answered that all data on reserves and resources are from the report of Geological Institute of Serbia from 2006.

* Several questions were asked regarding the proposed Exploration support system for private companies, i.e. subsidy for geological survey and loans for exploration. Mr. Nishikawa and Mr. Marutani explained the Japanese system for such cases and pointed out that maximum subsidy for a single mine is limited to 1 million USD. Subsidy fund can be established from royalties and taxes in mining industry.

* In discussion it was stated that harmony and partnership between mining companies and local society is vital for business, and that environmental protection must be considered from the very beginning of the exploration till the operation of mine.

* ヴラニエの『コシュタナ』という靴会社勤務者より、セルビア国内の軽工業への日本からの投資の可能性と、日本とセルビアの中小企業同士のビジネス交流の可能性について質問があった。これに対して、西川氏からは、本プロジェクトがそうした交流のための基盤作りであり、今後、日本セルビア間での交流が盛んになり、軽工業の盛んな町同士で友好関係が築ければ、中小企業同士の交流も可能になると回答があった。また、JICA の鹿野氏からは、セルビアの経済発展は小さな町の中小企業によっても支えられてきたのであり、こうした企業と日本の中小企業の交流は十分に可能であること、また、こうした事例を増やすためには町同士の交流が必須であることが説明された。

8-2(3) ローカルソサエティワークショップ写真

(2007年10月16日)



10月16日に Vranje にて地域ワークショップが開催された。開始時の会場は大勢の参加者(80名)で熱気に包まれた。



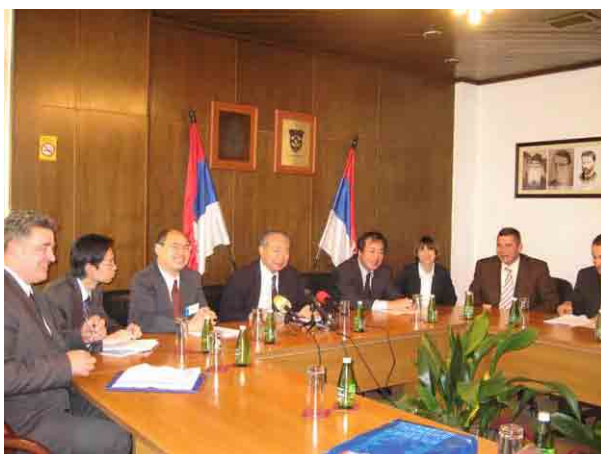
最初に Vranje 市長の歓迎のあいさつがあった。



長井駐セルビア日本大使がセルビア語で地域開発支援の講演をされた。



西川チームリーダーが鉱業活動と地域社会の関係を講演した。



講演の合間に記者会見が開かれ、大使、JICA 所長、MEM 等が出席。ジャーナリストは地方 TV 局が 3 社、新聞社が 2 社インタビューに来た。



ワークショップの最後に質疑応答があり、参加者から熱心な質問が相次いだ。



JICA Mining Master Plan Study Interim Workshop

- Setting the Course for Reconstructing the Mining Industry Base -



October 19, 2007 10:00-15:00 at “Nikola Tesla Conference Room”
Kneza Milosa 9, Belgrade
Tel : 011-3232-924

10:00~11:25

- | | | |
|---|---|--------|
| 1. Greeting | <i>His Excellency, Mr. A. Popovic, Minister of Energy and Mining</i> | 5 min |
| | <i>Dr M.Avramov, General Secretary, Ministry of Environmental Protection</i> | 5 min |
| | <i>His Excellency, Mr. T. Nagai, Ambassador, Embassy of Japan</i> | 5 min |
| | <i>Mr. M. Shikano, Resident Representative, JICA Balkan Office</i> | 5 min |
| 2. Progress with Privatization of the Mining Industry | <i>Mr A. Ljubic, Director, Serbian Privatization Agency</i> | 10 min |
| 3. Way to Reconstruct Serbian Mining Industry | <i>Mr Z.Teodorovic, Head of Dept. for Mining and Geology, Ministry of Energy and Mining</i> | 10 min |
| 4. Role of SIEPA and Its Future Relationship with the Mining Industry for Investment Promotion | <i>Mr B.Jankovic, Deputy Director, SIEPA</i> | 15 min |
| 5. Policy of Environmental Protection for Mining Activities by the Serbian Government | <i>Ms S.Kuzmanovic, Head of Dept. for Soil Protection, Ministry of Environmental Protection</i> | 15 min |
| Coffee Break | | 15 min |

11:25~13:10

Part 1: Issues with Defining Goals of the Master Plan

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|---|---|--------|
| 6. Recent Status of the RTB Bor Environmental Projects and Future Plan | <i>Mr. A.Popovic, World Bank</i> | 15 min |
| 7. Issues with the Serbian Mining Industry and Direction of the Master Plan | <i>Mr. Y. Nishikawa, JICA Team Leader</i> | 15 min |
| 8. JTI-The first private investment in Serbia | <i>Mr. K. Brown, Vice President, JTI Corporate Affairs and Communications</i> | 5 min |
| 9. Overview of Expanding GIS Database and Website | <i>Dr. K. Wada, GIS Expert, JICA Team</i> | 15 min |
| 10. Environmental Management in Kamioka mine | <i>Mr. M. Murata, Environmental Expert, JICA Team</i> | 15 min |
| 11. Activities and Issues of Mining Sector in Autonomous Province of Vojvodina | <i>Mr S.Lajos, Ass. Provincial Secretary, Provincial Secretariat for Energy and Mineral Resources</i> | 15 min |
| Discussion | 12:45~13:00 | 15 min |
| Coffee Break | 13:00~13:15 | 15 min |

13:15~14:35

Part 2: Issues with Mining Operations and Improvement—Results of a Case Study

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|---|--|--------|
| 12. Exploration Activities in Mines | <i>Mr. M. Marutani, Geological Expert, JICA Team</i> | 15 min |
| 13. Issues and Improvements for Small/Medium Mines in Serbia | <i>Mr. K. Shingu, Mining Expert, JICA Team</i> | 15 min |
| 14. Evaluation of Tailings Dams | <i>Mr. H. Ohki, Mineral Processing Expert, JICA Team</i> | 15 min |
| 15. Improvement of Mining Management | <i>Mr. M. Ozaki, Mining Accounting Expert, JICA Team</i> | 15 min |
| Discussion | 14:15~14:30 | 15 min |
| 16. Confirming the Direction of the Master Plan | <i>Mr Z. Teodorovic, Head of Dept. for Mining and Geology, Ministry of Energy and Mining</i> | 5 min |

8-3(2) インテリムワークショップ概要

1. テーマ

『鉱業基盤再建のための方向の確立』

2. 時間

2007年10月19日 (金) 10:00～15:00

ニコラテスラ カンファレンス・ルームにて

3. 出席者

- * エネルギー鉱業省大臣、日本大使、JICA所長、エネルギー鉱業省鉱山地質部局長、民営化庁、投資促進庁
環境保全省代表
 - * エネルギー鉱業省、環境保全省
 - * Grot 鉱山、Bor 鉱山、Vranje 民間企業
- 計 83人

4. 第一部 主要スピーチ内容（詳細は別紙ワークショップ資料集参照）

(1) エネルギー鉱業省大臣

Dr. Aleksandar Popovic, Minister of Energy and Mining of Serbia gave the opening remarks on the occasion of the Interim Workshop in Belgrade. He talked about the purposes of the Interim Workshop and the Study for Master Plan, the results in the previous period of the cooperation between the two governments as well as the further plans and guidelines of JICA team members and Japanese experts.

(2) 環境省

Project titled „Master Plan for Promoting of Mining Industry in Republic of Serbia“, is recognized as a strategic and useful one by the Ministry for Environmental Protection, mostly in terms of the future sustainable exploitation of mineral resources and in increase of the participation of mining in accomplishment of the faster economy growth- elevation of increase from 1% to 10% of participation of mining in GDP upon finalization of the project. Based on preliminary study results by Japanese experts which are being made up by now, it is obvious that there is potentiality of metallic mineral resources in the Republic of Serbia, which has an implication on reassert of the mining industry in our country, but this time with a possibility of strictly following the procedure within the framework of environmental protection, i.e. with fully respect not only for domestic legislative but for existing conventions in the field of environment. It can be expected that the companies, which will show interest in our market, already have a great experience in respecting the standards and directives in the field of environmental protection.

(3) J I C A 所長

Mr. Masao Shikano, Resident Representative of JICA Balkan Office addressed on the occasion of Interim Workshop in Belgrade with particular reference to the Study of Master Plan and the row of important events recorded during this year and these that will take place on afterwards.

There was the steering committee held last week. Master Plan started taking its shape and its components are implemented as scheduled.

There was regional workshop held in Vranje last Tuesday. The workshop was very successful with the participation of local community. Mr. Z. Teodorovic from the Ministry of Energy and Mining will visit Japan as a participant of JICA counterpart program. There will be Serbia investment seminar taking place in Tokyo in the end of November this year.

All these events will surely more attract Japanese investments in Serbia, noted Mr. Shikano.

5. 討議での主な内容

The first part of the workshop was devoted to issues concerning the reconstructing the Serbian mining industry, geology and environment in the mining sector as well as the future relations of the investment promotions to mining industry of Serbia. Presentations were given by representatives from the Ministry of Mining and Energy RS, Ministry of Environment, Serbian Privatization Agency, Serbian Agency for Investment and Export Promotion and Provincial Secretariat of Vojvodina for Mineral Resources and Energy. During the second and the third part of the workshop, JICA Team gave their presentations about defining of the goals of the Master Plan and were shown results of the Case Studies and issues of improvement of the mining management (Annex 2/Agenda).

During the first discussion Mr Vlada Simic asked about investments in geology and mines and about organization of such activities in Japan. Mr Nishikawa replied that the organization and a structure of the mining sector in Japan is the same as it is shown in the presentation. In connection with that he proposed to be established a subsidiary body in Vranje within the organizational chart of the Serbian mining sector. The loan institution exists for unexplored fields in Japan. The Japan Government supports development of the companies but on the other side companies have to pay royalty to Government, and a part of that fund is being allocated to financial support and loans for development of the companies. Mr Teodorovic said that he agrees with a proposed concept of the mining sector structure of the Mr Nishikawa's presentation, but there is necessity to be adopted by all relevant ministries and governmental bodies.

Mr Teodorovic pointed out presentation of Dr Wada about geological maps which can be found on the Web-GIS. The application is still in the preparation. Mr Lajos informed that the similar application of Web-GIS for using geological maps will be set up on the official website of the Provincial Secretariat for Mineral Resources and Energy untill the end of November.

Mr Spasojevic said a few words about WB loans in the field of environmental protection and a future cooperation with a Serbian Government in that field. He said that in the Grot mine the social aspect has to be taken into consideration and a transportation cost as well. He also added that it is important to submit EIA Study for each mining field, because it is necessary to show that is reliably from the technological point of view and to convince that there will not be negative impact on environment.

Regarding the future pilot projects, Mr Nishikawa said, that it should be allocated more funds and investments from other donors and international organizations .

Mr Zoran Popovic from MEP asked whether tested the host rock of the tailing dam. Mr Ohki explained that it will be the next step, and the Case Study aiming at determining the main problems and potentiality of the tailing dam. It is just one of the phases in the process of whole investigation.

Mr Teodorovic asked for other method for valorization of Au that can be used, because cyanidation method is not in compliance with our regulation. Mr Ohki replied that cyanidation method is an efficient procedure for Au valorisation and is very common method in industry. There is also an Acidic TioUrea method but it can be also dangerous for environment and cancerogenic for human health. Mr Zoran Stevanovic from Institute of Copper, said there are other numerous methods that can be applied for Au valorisation but with a lower utilisation factor.

8-3(3) インテリムワークショップ

(2007年10月16日)



10月19日にベオグラードでインテリムワークショップを開催した。マスコミも多数熱心に取材しており、セ国での関心の高さが伺えた。



ワークショップ司会はMEMのTeodrovic氏が勤めた。開会宣言。



最初にMEMのPopovic大臣が開催のあいさつをした。



長井駐セルビア日本大使も祝辞を述べられた。



セルビア鉱業の問題点とマスタープランの方向性について説明する西川団長。



ワークショップの最後に参加者からの質疑応答があった。熱心な質問が相次ぎ予定時間をオーバーし好評の内に終了。

8-4(1) 東京投資促進セミナープログラム Seminar for Promoting Investment in Serbia

日時：2007年11月27日（火）14:00～17:00（セミナー）、17:00～18:00（レセプション） 場所：国際協力銀行9階講堂
共催：在日セルビア共和国大使館、(独)石油天然ガス・金属鉱物資源機構(JOGMEC)、(独)国際協力機構(JICA)、
(財)海外投融資情報財団(JOI)

後援：(独)日本貿易振興機構(ジェトロ)、国際協力銀行(JBIC)

Date and time: Tuesday, November 27, 2007 14:00h~17:00h (Seminar), 17:00h~18:00h (Reception)

Location: 9th Floor Auditorium, Japan Bank for International Cooperation

Co-organized by: Embassy of the Republic of Serbia, Japan Oil, Gas and Metals National Corporation (JOGMEC),

Japan International Cooperation Agency (JICA), Japan Institute for Overseas Investment (JOI)

Supported by: Japan External Trade Organization (JETRO), Japan Bank for International Cooperation (JBIC)

プログラム／Program（日英同時通訳付：with English/ Japanese simultaneous interpretation）

- 14:00 – 14:10 開会挨拶
デヤン・ラユコヴィッチ（セルビア国エネルギー鉱業省次官補）
Opening Remarks
Mr. Dejan Rajkovic, Assistant Minister, Ministry of Energy and Mining, the Republic of Serbia
- 14:10 – 14:20 鉱業分野における JICA の取組みと本セミナーの狙い
永塚 誠一（国際協力機構(JICA) 理事）
JICA's Commitment Cooperation in the Mining Sector and the Purposes of this Seminar
Mr. Seiichi Nagatsuka, Vice President, Japan International Cooperation Agency (JICA)
- 14:20 – 14:30 今日におけるセルビアと日本の関係
イヴァン・ムルキッチ閣下（駐日セルビア共和国大使）
Contemporary Serbia and Its Relations with Japan
H.E. Mr. Ivan Mrkic, Ambassador of the Republic of Serbia to Japan
- 14:30 – 14:55 セルビア経済と投資環境
ダルコ・ジュキッチ（セルビア投資促進庁 戦略投資局長）
Serbia's Economy and Investment Climate
Mr. Darko Djukic, Head of Department for Strategic Investment, Serbian Investment and Export Promotion Agency (SIEPA)
- 14:55 – 15:10 コーヒー・ブレイク／Coffee Break
- 15:10 – 15:30 JT のセルビアにおける経験
山本 博（日本たばこ産業株式会社 事業企画室部長）
Experience of JT in Serbia
Mr. Hiroshi Yamamoto, Vice President, Tobacco Business Planning Division, Japan Tobacco Inc. (JT)
- 15:30 – 15:55 セルビア鉱業と産業能力
ゾラン・テオドロヴィッチ（セルビア国エネルギー鉱業省 鉱業地質局長）
Recent State of Serbia's Mining and Manufacturing Capacity
Mr. Zoran Teodorovic, Head of Mining and Geological Department, Ministry of Energy and Mining, the Republic of Serbia
- 15:55 – 16:10 環境保全における課題
ゾラン・ヴェリコヴィッチ（セルビア国環境保全省 局長）
Environmental Protection Issue
Mr. Zoran Veljkovic, Head, Ministry of Environmental Protection, the Republic of Serbia
- 16:10 – 16:30 セルビアの鉱物資源ポテンシャルと鉱業への投資の機会とメリット
西川 有司（JICA 開発調査チームリーダー）
Investment Opportunities and Advantages of the Mining Industry and Mineral Resources Potential of Serbia
Mr. Yuji Nishikawa, Team Leader, Japan International Cooperation Agency (JICA)
- 16:30 – 16:50 質疑応答／Questions & Answers
- 16:50 – 17:00 閉会挨拶／Closing Remarks
- 17:00 – 18:00 レセプション／Reception

8-4(2) 東京投資促進セミナー概要

1. 背景

セルビア共和国は、EU 圏に属し、欧州とアジアを結び地勢的な要衝の地として位置づけられている。2000 年以降、紛争と社会主義経済体制で疲弊した経済の再建が開始されている。

セルビアは、ユーゴスラビア時代より鉱業国としてベースメタル(Cu、Zn)などの探査開発、生産、製錬のフルセット技術を保有し、欧州の原料供給基地としての役割ばかりでなく、かつ工業用金属加工材料の生産基地であり、セルビアは、その中心を担ってきた。

紛争、市場経済化の影響により、1990 年代鉱山、製錬の生産量は 1/5 に落込み、現在その建て直しの一環として民営化を促進中である。一方、広域的地質構造に基づき、資源ポテンシャルの高い資源国としての位置づけにもある。

探査開発をはじめ、鉱山、製錬、加工への投資環境整備が整いつつあり、欧州やロシアとの貿易圏の一角として、国境を越えた経済活動への土台が築かれつつある。

2. JICA 鉱業振興マスタープラン(MP)調査の役割

セルビア政府の鉱業セクター再建を目的とした MP 調査の要請に基づき、2006 年 12 月より JICA 鉱業振興 MP 調査が実施されている。JICA MP 調査は、鉱業分野の実態を把握し、民営化後の鉱業セクター管理のための方向づけを明確にさせ、鉱業を振興させるマスタープランを作成することが目的であり、投資促進、経済発展に貢献する役割をもつ。

3. 鉱業分野の投資対象

ロシア、欧州圏との自由貿易を基盤とし、ベースメタル、金属加工生産物の輸出基地としての優位性を有し、投資対象は広範囲におよぶ。

- 探査、鉱山開発
- 生産鉱山
- Cu、Zn 製錬所
- 金属加工製品、工業用金属部品

4. 東京投資セミナーの骨子

1) 目的

- セルビアの国情、経済、地勢的位置づけへの理解
- セルビアの投資環境の説明
- セルビアの鉱業分野投資対象の紹介

2) 日時、場所、講演

別紙

3) 参加対象

鉱山製錬会社、商社、金融、金属製造業、自動車部品

8-4(3) 東京投資促進セミナー写真



セミナー会場風景



セミナー会場風景



永塚 誠一氏(国際協力機構(JICA) 理事)



イヴァン・ムルキッチ閣下(駐日セルビア共和国大使)



山本 博氏(日本たばこ産業株式会社 事業企画室部長)



Mr. Zoran Teodorovic, (セルビア国エネルギー鉱業省
鉱業地質局長)

The Association of Mining Analysis
The Serbia Mining Sector

January 30th, 2008 – Armourers' Hall

Programme

- 0845 Doors open to receive guests. Coffee, Tea, refreshments and croissants available
- 0930 *Mr. Dragan Zupanjevac, the Serbian Chargé d’Affaires* will welcome delegates and introduce the Assistant Minister of Energy and Mining
- 0935 The Serbian Assistant Minister of Energy and Mining to welcome delegates
Mr. Dejan Rajkovic, Assistant Minister
- 0945 Introduction to Serbia and its Mining Sector
Mr. Zoran Teodorovic – Head of Mining & Geology, Ministry of Energy & Mining
- 1010 The work of SIEPA, the Serbian Investment Promotion Agency
Mr. Darko Dukić – Head of Investment Department, SIEPA
- 1035 Highlights of the Japan International Cooperation Agency’s Study on the Master Plan for the Promotion of the Mining Industry in the Republic of Serbia
Mr. Yuji Nishikawa - Leader JICA Team
- 1100 Break for coffee
- 1125 Serbian Mining law, regulation and taxes
Mrs. Milica Zoric – Mining Law Specialist, Ministry of Energy and Mining
- 1150 The Geology and Mineralisation of Serbia
Mr. Masaharu Marutani - JICA Team
- 1215 The new website of the Ministry of Energy and Mining
Dr. Kazushige Wada - JICA Team
- 1235 Break for Serbian Lunch
- 1400 Description of the Opportunities for investment in Copper, Lead and Zinc operations
Mr. Richard Thompson - JICA Team
- 1420 Exploration in Serbia 1
Mr. John Menzies – Chairman, Euromax
- 1440 Exploration in Serbia 2
Mr. Gerard Rheinberger, Manager, Rio Tinto Exploration, S.East Europe
- 1500 Serbian Privatisation
Mr. Zoran Teodorovic – Head of Mining & Geology, Ministry of Energy & Mining
- 1520 Closing remarks by the Assistant Minister of Mines
Mr. Dejan Rajkovic
- 1525 Closing remarks on behalf of JICA team
Mr. Y. Nishikawa, JICA team leader
- 1530 Informal discussion, tea and networking
- 1630 Seminar closes

8-5(2) AMA セミナー写真



会場となった Armourers' Hall



会場風景。70 席用意してあった座席が満席となった。



右より在英セルビア大使、ライコビッチ MEM 次官、トンプソン 団員(司会進行を担当)



在英セルビア大使よりライコビッチ MEM 次官を紹介。



ライコビッチ大臣次官からの挨拶



MEM テオドロビッチ氏はセ国鉱業セクターを紹介



SIEPA ドウキッチ氏から SIEPA の活動を紹介



西川団長は JICA マスタープラン調査の骨子を講演



MEM ソリッチ鉱業法専門家はセ国鉱業法、鉱業規則を紹介



丸谷団員はセ国の地質、鉱物資源について講演



和田団員は MP 調査で構築した WebGIS を紹介



コーヒープレーク中の歓談風景



トンブソン団員はセ国非鉄金属鉱山の投資機会を講演



セ国民間企業”Farmakom MB”は自社の鉱業活動を紹介。
(当初プログラムには組み込まれていなかったが急遽講演することになった。)



“EUROMAX”社はバルカン地域での探査活動を紹介



“Rio Tinto”は自社の戦略、セ国での探査プログラムを紹介。



西川団長による Closing Speech



各講演資料ほか”Investment Review”、“Investment guide CD”等を配布



8-6(1) ファイナルセミナープログラム

JICA Mining Master Plan Study: Final Seminar

- Creating a Road Map for Promoting the Mining Industry of Serbia -

February 6, 2008
10:00-14:30

at Sava Center
Milentija Popovića 9, 11070 Belgrade, Serbia
Tel: 011 220 60 00



Greeting	10:00~10:25	
		<i>His Excellency, Dr. A. Popovic, Minister of Energy and Mining</i> 5 min
		<i>His Excellency, Mr. S. Dragin, Minister, Ministry of Environmental Protection</i> 5 min
		<i>His Excellency, Mr. M. Cvetkovic, Minister, Ministry of Finance</i> 5 min
		<i>His Excellency, Mr. T. Nagai, Ambassador, Embassy of Japan</i> 5 min
		<i>Dr. M. Yoshida, Senior Advisor, JICA Headquarters</i> 5 min
Coffee Break	10:25~10:40	
	10:40~11:30	
		<u>Part1: Implementing the Master Plan</u>
1. Economic Position of and Expectations for the Serbian Mining Industry		<i>Mr. I. Momcilovic, Assistant Minister, Ministry of Finance</i> 10 min
2. Improvement of Environmental Protection vis-à-vis Mining Activities		<i>Mr. Nikola Ille, Environmental Specialist, The World Bank</i> 10 min
3. Reconstruction of the Serbian Mining Industry and Future Vision based on Master Plan		<i>Mr. Z. Teodorovic, Head of Dep. for Mining and Geology, Ministry of Energy and Mining</i> 15 min
4. Master Plan and Road Map for Promoting the Mining Industry		<i>Mr. Y. Nishikawa, JICA Team Leader</i> 15 min
Coffee Break	11:30~11:50	
	11:50~12:40	
		<u>Part 2: Road Map for Promoting the Mining Industry</u>
5. Laws from Mining and Geological field		<i>Ms. M. Zoric, Mining Law Specialist, Ministry of Energy and Mining</i> 10 min
6. The Road to Resolving Environmental Issues Caused by Mining Activities		<i>Mr. Z. Veljkovic, Head, Ministry of Environmental Protection</i> 10 min
7. Ways of Promoting Domestically-owned Companies		<i>Mr. Darko Djukic, Head of Investment Promotion Department, SIEPA</i> 15 min
8. Outlook for the MEM Website and GIS Database		<i>Dr. K. Wada, GIS Expert, JICA Team</i> 15 min
Discussion	12:40~12:55	
Coffee Break	12:55~13:10	
	13:10~14:15	
		<u>Part 3: Vision of the Master Plan</u>
9. Mineral Resources Potential and Promoting Exploration Work		<i>Mr. M. Marutani, Geological Expert, JICA Team</i> 15 min
10. Case Study Results and Future Vision		<i>Mr. H. Ohki, Mineral Processing Expert, JICA Team ICA Team</i> 15 min
11. Reconstruction of the Mining System and Outlook for Efficient Operations		<i>Mr. K. Shingu, Mining Expert, JICA Team</i> 15 min
12. Environmental Protection and Sustainable Development with Master Plan		<i>Ms. Biljana Vaskovic, Specialist, Dept. for Planning and Management, Ministry of Environmental Protection</i> 10 min
13. Confirming the Master Plan		<i>Mr. Z. Teodorovic, Head of Dept. for Mining and Geology, Ministry of Energy and Mining</i> 10 min
Discussion	14:15~14:30	
Closing Address		<i>Mr. Dejan Rajkovic, Assistant Minister, Ministry of Energy and Mining</i>
Light Refreshments	14:30~15:00	

8-6(2) ファイナルセミナー写真 (2月6日)



会場となった SAVA Center



セミナー開催旗



会場風景1



会場風景2。約 130 名が参加



右より MEM ポボビッチ大臣、ライコビッチ大臣補佐、テオドロビッチ氏



左より長井大使、JICA 吉田国際協力専門員、世銀イレ環境専門家、西川団長、通訳



MEM ポポビッチ大臣の挨拶



長井大使の挨拶



JICA 本部吉田国際協力専門員の挨拶



報道陣のインタビューに答える MEM ポポビッチ大臣



世銀イレ環境専門家は鉱業活動に関連する環境保護について講演



MEM テオドロビッチ氏はマスタープランに基づく鉱業の将来像を講演



西川団長は鉱業振興マスタープランを講演



MEM ゴリッチ鉱業法専門家による講演



コーヒーブレイク中の歓談風景



MEP ペリコビッチ氏による講演



SIEPA デュキッチ氏による講演



“EUROMAX”社はバルカン地域での探査活動を紹介
(当初プログラムには組み込まれていなかったが急遽講演することになった。)



和田団員は MEM の Web-GIS を紹介



丸谷団員はセ国の鉱物資源、探査促進について講演



大木団員はケーススタディ結果を発表



新宮団員は採鉱システムの改善と高能率操業の概要を紹介。



MEP バスコビッチ女史による講演



MEM ライコビッチ大臣補佐による閉会挨拶

8-7 サプリメント骨子

Country Mining Supplement to The Mining Journal on Serbia

Background:

Mining Communications Ltd (MCL) is proposing to publish, in association with JICA, a special country Mining Supplement on Serbia. This Supplement may be distributed with a CD-ROM Guide to the Serbian Mining Sector. (The details of this guide follow in the next section below.)

Length of Publication:

12 pages A4 format

Editorial Content:

Editorial to be prepared by the Study Team and approved by JICA to include all or a selection of the following:

- Front Cover (to be designed by MCL with material supplied)
- Introductory article
- Description of Serbian Geology
- Summary of recent geological mapping activity
- Organisation of the mining sector
- The mining sector and principal projects
- Mining Policy, Law and Regulation
- Serbian history, culture, infrastructure and demographics
- Climate, water resources, communications
- Key Government contacts, mining sector office contacts

Material for MCL should be sent in electronic format, with all illustrations such as photos, logos, maps, diagrams in JPEG or PDF at a minimum resolution of 300DPI (dots per square inch). Richard Thompson will co-ordinate this promotional activity for the Study Team. (rttmining@btinternet.com).

Provisional Publication date:

Friday October 12th 2007.

8-8 ガイドブック骨子

An Investor's Guide to the Mining Sector in Serbia

Background: Mining Communications Ltd (MCL) is proposing to publish in October 2007, in association with JICA, a special country Mining Sector Guide on Serbia. This Guide will be published as a CD-ROM and as a 52 page coloured brochure. The details of this guide follow in this section.

Length: 52 pages. 12 Full colour, A4.

Editorial Content:

Editorial to be provided by the JICA Study team to include all or a selection of the following:

- Front Cover (to be designed by MCL with Material supplied)
- Brief History and Culture
- Climate and Heritage
- Economic development and Mineral Resources
- The current situation in Serbia mining sector
- The geology and characteristics of Serbian deposits
- Deposit models and areas of promising opportunities
- Organisation of the mining sector
- Mining Policy and relevant mining issues
- Finding information about the minerals sector
- Other background information

Material should be sent in electronic format, with all illustrations such as photos, logos, maps, diagrams in JPEG or PDF at a minimum resolution of 300DPI (dots per square inch). Richard Thompson will co-ordinate this promotional activity for the Study Team. (rttmining@btinternet.com).

Provisional Publication date:

Friday October 12th, 2007.