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T.I.C.

TANTALUM-NIOBIUM INTERNATIONAL STUDY CENTER

PRESIDENT'S LETTER

Dear Friends,

December - and Europe is already in the grips of its worst early winter for decades. It is a time to look back and reflect on the past year, and forward to what 2011 may bring. The dramatic shrinking of the tantalum and niobium markets caused by the 2008/9 recession continued to reverberate throughout our industries for much of the year, but we are now beginning to see a return to a growth cycle. Next year should be an exciting one, as we all gear up again to meet the challenges ahead.

The recent General Assembly held on the shores of Lake Tahoe was a great occasion, thanks to the sterling efforts made by our hosts, Niotan Inc. The venue was indeed breathtaking and the entertainment at the banquet most colourful. The plant visit, and the sightseeing tour to Virginia City which followed, made an excellent finale to a busy but enjoyable few days. I would like to take this opportunity to thank everyone who made the Assembly, the technical papers, and the tour such a success.

We are already looking forward to next year's Assembly - the Fifty-second - that will take place in Almaty, Kazakhstan. As indicated in Lake Tahoe, the Executive Committee has also decided it is time to take the Assembly to Africa, and we are investigating Cape Town as a possible venue for 2012.

The Executive Committee said goodbye to Dr Werner Lohwasser, following the retirement of Mr He Ji-Lin already announced in June, and welcomed Dr Daniel Persico (Kemet Electronics) and Mr Jiang Bin (CNMC Ningxia Orient Group). I would like to thank the Committee and Membership for asking me to continue as President for a second term, as our efforts related to Artisanal Mining begin to reach fruition. The Bulletin breaks a tradition of publishing the 'statistics paper' in this issue, and presents the paper that fully updates readers on this highly complex matter.

Finally, the T.I.C. would not function without our dedicated Secretary General, Emma Wickens, and our Technical Promotion Officer, Ulric Schwela - I thank them on behalf of all the Membership for their work over the last twelve months, and look forward to working with them again in 2011.

I wish you all a joyous holiday season, and a very good New Year.

Richard Burt
President

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FIFTY-FIRST GENERAL ASSEMBLY

The Tantalum-Niobium International Study Center held its annual conference in Incline Village by Lake Tahoe, Nevada, USA, from October 3rd to 6th 2010. This was the Fifty-first General Assembly since the foundation of the T.I.C. back in 1974.

On October 4th and 5th, technical presentations were given in two half-day sessions. The second part of Tuesday morning was devoted to a special session on the tantalum supply chain, including a panel discussion. The paper presented by Mr Richard Burt and Mr William Millman is printed in this issue of the Bulletin, and some of the other technical papers will be published in future editions.

Delegates, guests and accompanying persons enjoyed a Welcome Reception on Sunday evening and a Gala Dinner on Monday night. Entertainment followed the 'rat pack' theme with a group of dancers and an entertainer who impersonated several of the famous singers and actors of that era.

On Wednesday, Niotan Inc welcomed delegates to a tour of the company's facility located at Mound House, near Carson City. The plant tour group was then taken to Virginia City for a guided bus tour and separate walk, before meeting up with the accompanying persons in Gold Hill for a lunch in the area's oldest hotel, built in 1859.

The accompanying persons enjoyed a three-day sightseeing programme. They toured by bus the entire circumference of Lake Tahoe with stops including Thunderbird Lodge Estate, Emerald Bay and Squaw Valley, then took to the lake itself on board the paddle boat MS Dixie II, finally visiting Virginia City for a narrated trolley bus ride before meeting up with the plant tour delegates in Gold Hill.

General Assembly

Two companies were elected as new members of the association by a unanimous vote. Their names and contact details are printed in the last section of this Bulletin, under 'Member company news'.

Mr Richard Burt was re-elected as President of the T.I.C. for a second term of office. Mr Jiang Bin and Dr Daniel Persico were elected to the Executive Committee. Mr John Crawley, Mr José Isildo de Vargas, Mr Alan Ewart, Mr Alexandr Gagarin, Mr William Millman, Dr Karlheinz Reichert, Mr Itamar Resende, Mr Lawrence Stryker and Mr Barry Valder were re-elected to a further term of office. Mr He Ji-Lin and Dr Werner Lohwasser resigned from the Committee.

www.tanb.org
e-mail to
info@tanb.org

Fifty-first General Assembly
Lake Tahoe, Nevada, U.S.A.

With thanks to K. Parker, L. Rochez, E. Vargas, E. Gilerman (accompanying persons tours), D. Bulick (plant tour), Ciprian Photography (gala dinner), S. Baum (background).

Fifty-second General Assembly

The Fifty-second General Assembly is scheduled to take place in Almaty, Kazakhstan, and will include a plant tour to Ulba Metallurgical Plant located in Ust-Kamenogorsk. The proposed dates are Sunday October 16th to Wednesday October 19th 2011.

Call for papers: please submit your proposals for papers for the technical sessions, before March 31st 2011.

An article presenting the production statistics collected by the T.I.C. and the progress on issues related to the transport of raw materials, based on the paper given by Mr Ulric Schwela at the Fifty-first General Assembly in Lake Tahoe, will be printed in Bulletin 145, in March 2011.

ORDER OUT OF CHAOS

Paper presented by Richard Burt (GraviTa Inc) and William Millman (AVX Ltd) on October 5th 2010, as part of the Fifty-first General Assembly of the T.I.C., held in Lake Tahoe, Nevada, U.S.A., updated to reflect the situation at the end of November 2010.

Introduction

The T.I.C. Artisanal and Small Scale Mining Policy was ratified by the membership at the Fiftieth General Assembly in Tallinn in October 2009, and a subsequent presentation provided a road-map for its implementation. Since Tallinn, the issue of mining and trading of minerals from countries of weak governance has received considerable attention from various bodies, including the United Nations, the OECD, the International Conference on the Great Lakes Region (ICGLR), the German and US Governments amongst others, the tin industry, and tantalum's major end-users - the electronics and telecommunications industries. This paper will provide an update on these various initiatives, and explain the role that the T.I.C. has been playing in shaping the conclusions and our efforts to bring 'order out of chaos' in the tantalum supply chain from central Africa, with our support of the iTSCi Pilot Project underway in the eastern Democratic Republic of the Congo (DRC).

Background

To suggest, as many reports appear to do, that the use of 'coltan' in mobile phones is the root cause of the conflict in the eastern DRC is incorrect; not only from a historical perspective but also from the relative importance of the DRC 'coltan' industry - both in terms of other mining activities in the eastern DRC, and within a world-wide context.

Historically, the Congo was settled by two sophisticated kingdoms - that of the Kongo in the west and a Rwandan Kingdom, that covered what is now Rwanda, Burundi, parts of Uganda and Tanzania, and the eastern part of the Congo in the east, with a myriad of tribal settlements in the interior. From 1883, when King Leopold's 'kingdom' of the Congo was first recognised (by the United States), to 1960, the Congo was a Belgian colony. Throughout much of this, Ruanda-Urundi (that is the part of the old Kingdom of Rwanda east of the Rift Valley) was a 'mandate' of Belgium and to all intents and purposes continued to be regarded as part of the Congo.

The Congo obtained independence in 1960, and almost as an afterthought, so did Ruanda-Urundi - as the separate nations of Rwanda and Burundi. For much of the next 35 years, the Congo - renamed Zaire in 1971 - was dominated by President Mobuto Sese Seko's ever increasingly corrupt and inept governance, which drove the economy, the infrastructure and the mining industry into the ground. Then in 1994, the racial divide in Rwanda erupted, with the genocide and civil war, driving over a million mainly Hutu Rwandese - including many of the perpetrators of the genocide - into eastern DRC. The resultant chaos, and the fall of Mobutu to a rebel group led by Laurent Kabila that originated in the eastern DRC plunged the country into further turmoil; 'Africa's World War' commenced. While a peace agreement was signed late 2002, various rebel groups continue to commit atrocities throughout eastern DRC. Expropriation of the Congo's mineral wealth by armed forces (both rebel and Government), while undoubtedly prolonging the conflicts, is an effect, not a cause.

While central African production is obviously of importance to the tantalum industry, varying between ¼ and ¾ million pounds Ta_2O_5 contained per year[1], based upon information from various sources, the value of tantalum ore exports from the DRC is an order of magnitude less than exports of cassiterite (tin ore). However, gold is far more of an issue than tin and tantalum (as well as tungsten) combined (for example see Garrett et al[2]). Gold is so much more easily transportable[3] that it is estimated close to 90% of it is illegally exported from the area, and the most recent UN report estimates the trade is worth in excess of US$160 million per year[4]. Even allowing for a certain amount of guesswork in these figures, and the changing relationship of metal prices, tantalum's relative role in central Africa is therefore quite small.

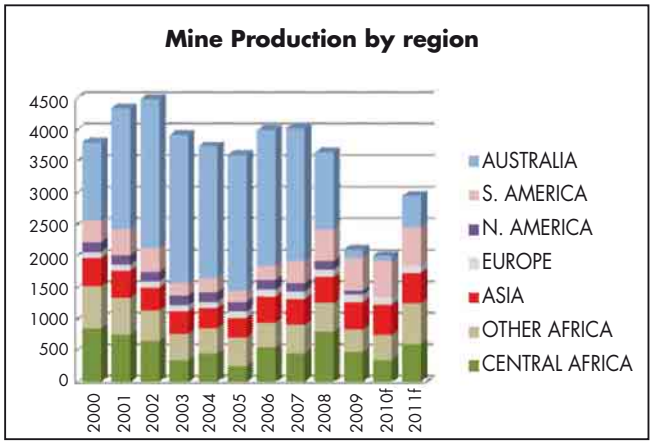

Figure 1: Third party estimates of mine production ('000 lb Ta_2O_5). These data are not generated by the T.I.C.

Finally, tantalum is a very minor constituent of mobile phones. The value of tantalum in a phone is just US$0.02, or less than 1% of other metals[5]. This sector consumes slightly less than 10 percent of total tantalum production in any year.

Claiming that tantalum's use in mobile phones is 'the major source of funding' of the rebel activity in the DRC is simply misinformation.

The T.I.C. Working Group

The first United Nations report on the issue was released in 2002[6]. It was this report that claimed 'warring parties were deliberately prolonging the conflict to plunder gold, diamonds, timber [as well as] coltan'[7]. While several T.I.C. members were 'named' in the original report, each of them was able to successfully clarify its position. Resulting from this report, the T.I.C. issued a statement calling on its members to commit to 'lawful and ethical trade practices', but decided against developing a specific T.I.C. 'Code of Ethics'. It also rejected the idea of 'policing' the membership's activities in central Africa or elsewhere.

A second report was issued by the UN in November 2008[8], which detailed the increased rebel activity and resultant

atrocities and the resultant ongoing problems, especially targeting the tantalum supply chain.

The T.I.C. Executive Committee determined that it was time the T.I.C. took a more proactive approach, and formed a sub-committee, known as the 'Working Group on Tantalum and Niobium Mining' (WGTNM), with a mandate to promote the tantalum and niobium industries, to explore the issues related to the Artisanal and Small Scale Mining (ASM) sector. The Group held its first meeting at the beginning of 2009, and developed a new ASM Policy with three basic tenets, especially in the context of central Africa:
- to break the link between legitimate trade and conflict financing
- to seek improvements in environmental and employment practices
- to work toward constructive engagement not disengagement.

This Policy was accepted by the Executive Committee in April 2009, and ratified by the membership at the Fiftieth General Assembly, held in Tallinn, in October 2009. Thereafter the Working Group held several meetings in the succeeding months, and studied several potential implementation strategies including an individual T.I.C. programme in Katanga Province.

Concurrently, discussions were held with others within the supply chain, including the tin industry and our major consumer industries - the electronics and telecommunications industries. It was determined that only combining our efforts with those of ITRI Ltd in a single initiative would garner general acceptance. ITRI Ltd[9] had already developed a three phase iTSCi initiative in close collaboration with the Government of the DRC:

- Phase 1: Establishing harmonised document requirements for export shipments including written declarations confirming the lack of involvement of illegal armed groups in the upstream supply chain
- Phase 2: Developing and implementing a system to ensure mineral traceability from exporter back to the mine site and to develop chain of custody data
- Phase 3: Implementing basic performance standard measurement of social and environmental factors at mine sites and to consider incentives and methods for improvements

Phase 1 commenced in July 2009 and ran through to mid 2010. The T.I.C. therefore agreed to make a one-time payment of US$125,000 towards the cost of a six-month 'Pilot Programme' to test Phase 2 of this initiative.

At that stage the Working Group changed to an Implementation Group, with a resultant change in the membership of the Group to include two traders with long experience in central Africa.

The Central African Supply Chain

Whereas an 'industrial mine' will generally negotiate contracts with and ship product directly to the processors, this is often not the case with non-industrial or artisanal miners who would generally deal through a trader. In the central African context, especially in the DRC, it is even more complex than that.

An artisanal mine is actually reasonably well structured, with diggers, washers, crushers, jiggers, transporters all having their role. For the sake of simplicity, we will regard them as the 'diggers'. Partially concentrated ore is manually transported in up to 50kg sacks from the minesite - in some cases on a two-day journey - to a central location where it is purchased by negociants who consolidate material and arrange onward transport by road or plane to 'comptoirs' in Bukavu, Goma or in Rwanda. The 'comptoirs' carry out secondary processing, packaging, analysis and prepare material for export to processors. The actual transaction is carried out by the international traders. Indeed, such is the complexity of the internal supply chain, the first requirement of several of the initiatives currently being tested or developed is 'mapping the supply chain'.

The supply chain has several 'holes' by which legitimately mined and traded material can be contaminated. Most directly is the de-facto ownership of minesites by rebel forces - or various factions of the, often unpaid, state forces - and the direct mining and sale of production. Less directly, these same forces can simply extract significant 'tythes' or 'royalties' from the diggers either in the form of money or product. Indirectly, material can be 'illegally taxed' generally at unofficial check-points during its transportation. Finally, not an inconsiderable amount of material has been known to have been smuggled across the DRC border for rebranding in neighbouring countries, or several years ago, even as far south as Mozambique (Figure 2). Each of these deprives the Government of its legal taxes, which in turn deprives the local population of the chance for improvement of local infrastructure.

The key to any successful programme that can break the linkage between mineral trade and conflict financing is therefore effective and cost effective traceability, from legitimate digger to exporter.

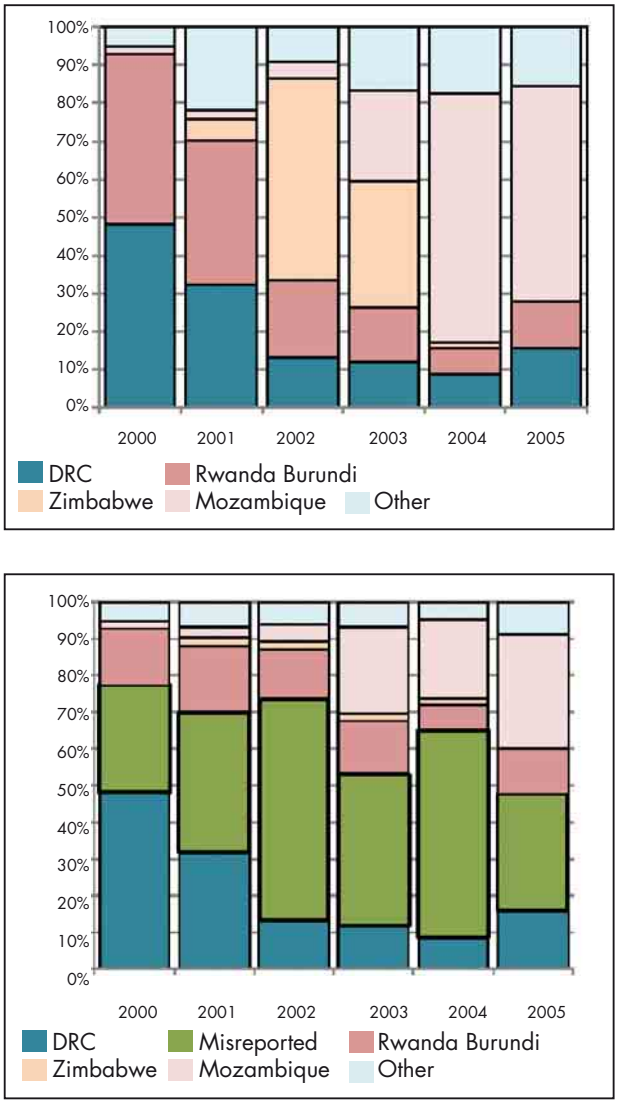

Figure 2: Data as reported by ICGLR 2000-2005 (top) compared to more likely production (bottom) showing amount that has been 'misreported'

The iTSCi scheme in brief
Details of the iTSCi scheme have been published elsewhere[10] , and a subsequent presentation discusses its progress in detail[11], so this paper will therefore provide only a brief overview.

The system accepts that the various official documents required to be completed and signed by Government officials at various stages throughout the supply chain up to the point of export would not be regarded by the world community as sufficient for full traceability of material back from the point of export to the individual mine.

Phase 2 therefore adds to this documentation requirement a 'bag and tag' system, whereby each bag of concentrate is sealed, at the minesite and in the presence of a Government official, with a uniquely numbered plastic tag provided by the scheme's managers to legitimate mines and based on historic actual production. As material is consolidated, new tags are affixed to bags, and these secondary tags follow the material right through to the processor. On both occasions, information including site, date, weight, transport method and negociant (buyer) is entered in a logbook, and this information is re-entered into a database, which can compare data and flag any discrepancies. Tin is traded openly on a daily basis on the London Metal Exchange, whereas tantalum is not. Consequently, while the tin industry will be publishing prices throughout the supply chain, tantalum price information beyond the negociant level will remain confidential.

Piloting of Phase 2 commenced mid 2010, at the Kalehele mine in South Kivu. Apart from the minor problems described in Hayes' paper, it was generally very successful, confirming that the iTSCi scheme will be an efficient and cost effective method of tracing ore from legitimate mine to export.

On September 11th, President Kabila announced that all artisanal mining, transportation and trading of tantalum, tin and other metals (including gold), would be suspended forthwith, and this would remain in force until the Government was able to wrest control of the mines out of the hands of 'the mafias currently in control', and to reinstate the rule of law. While this suspension is said to allow for early restart of mines with a proper traceability system in place - e.g. the iTSCi scheme - no restart date is yet available. Apart from the direct impact on the local community, it does of course mean that the iTSCi scheme is also suspended, with the result that no more funding for iTSCi will be available until the ban is lifted. Indeed, as of November 2nd, the majority of iTSCi staff in Goma and Bukavu was laid-off.

Roll-out of the scheme throughout the DRC and elsewhere in central Africa is of course the aim. Several T.I.C. members took the initiative to finance an implementation study in Katanga Province. Not only is Katanga the potential source of up to half of the tantalite mined in the DRC, it is not one of the three Provinces regarded as 'conflict zones'. The study was completed late November 2010. As a result, roll-out into Katanga could commence as soon as start-up funding is put in place.

In parallel, the Government of Rwanda has signed a Memorandum of Understanding with iTSCi for a phased roll-out throughout Rwanda, with complete implementation by the end of March 2011.

EICC/GeSI
The EICC and GeSI represent some 40 electronics and over 20 telecommunications companies respectively: that is, tantalum's major customer block. The two organisations, reacting to Civic Society pressure, combined to establish the EICC/GeSI Extractive Industries Working Group, and commenced a series of workshops in September 2009 on the tantalum supply chain. A total of five workshops, now incorporating tin, have been held to date.

The EICC/GeSI studies soon reached the inevitable conclusion that the processors are the 'pinch point' in the supply chain. Not only are there a limited number, but, upstream of the processors, minerals (even when mixed) bear a mineral signature and can theoretically be traced whereas, downstream, the mineral structure has disappeared. Consequently, the EICC/GeSI approach is to validate processors, such validation including a detailed third party independent audit. Processors for their part are required to provide appropriate documentation; the closer the point of origin of the ore to central Africa, the greater the level of documentation required. For central African material, this includes traceability through the iTSCi scheme - a scheme which the EICC/GeSI strongly and publicly supports. Further details will be provided in a separate paper[12].

The EICC/GeSI Working Group is concerned however that, to date, other sectors of industry have not taken a similar stance - its catch phrase being that 'Building half a dam is not good enough', the rest of industry needs to build the other half. Fortunately, the automotive industry has now understood the situation and is holding its own supply chain meeting in January 2011[13], at which the T.I.C. will be represented.

International initiatives and their impact
The T.I.C. and ITRI are by no means alone in their efforts to break the link between mining and conflict financing - indeed it would appear to be a complex web of initiatives, while many NGOs would claim to be the force driving the change. The T.I.C. has played an active role in several of these initiatives.

While both the iTSCi and EICC/GeSI initiatives are industry led, and others initiatives have been the result of consultations with such organisations as the OECD and ICGLR, there is no doubt that the recent US legislation, the Dodd-Frank Wall Street Reform and Consumer Protection Act, 'trumps' all the others. It is the only one that could result in CEOs ending up in jail: a powerful motive to comply.

The Dodd-Frank Wall Street Reform and Consumer Protection Act
The Dodd-Frank Act was passed by the US Legislature and signed into law by President Obama in July 2010[14]. The key section, as far as this industry is concerned, is section 1502 'conflict minerals' within the Miscellaneous Provisions Section. The law requires the Securities & Exchange Commission (SEC) to promulgate the regulations within 270 days - that is by April 2011.

Essentially, the law places a legal obligation on all US companies that report to the SEC to declare the use of 'conflict minerals' and metals originating from the DRC or adjoining countries as of their first Annual Report covering the full 12 months after promulgation of the regulations – that means, for most companies, in their 2012 Annual Report. The law has defined 'conflict minerals' as 'columbotantalite ('coltan'), cassiterite, wolframite, gold AND their derivatives'. Whether this inadvertently includes niobium is as yet unclear. Adjoining countries are Uganda, Rwanda, Burundi, Tanzania, Zambia, Angola, Republic of Congo, Central African Republic and the Sudan. Kenya, while not an 'adjoining country', may yet be incorporated as it is an important transport route for minerals. Finally, 'all SEC reporting companies' widens the net from the electronics industry to include aerospace, auto manufacturers, chemical industries, defence, medical, cutting tools, alloys, etc.

The law also requires that the Departments of State and Commerce develop within 180 days, and thereafter maintain, 'a map of mineral-rich zones, trade routes, and areas under the control of armed groups in the Democratic Republic of the Congo and adjoining countries'. It will, theoretically, be a 'definitive' map showing which mines are 'conflict mines' and which are not; as such it will be a valuable tool not only for the

SEC, but also for industry.

The law does not prohibit the use of 'conflict minerals': it states that '... a product may be labelled as 'DRC conflict free' if the product does not contain conflict minerals that directly or indirectly finance or benefit armed groups in the Democratic Republic of the Congo or an adjoining country'. This requires stringent Due Diligence, and independent third party audits carried out by auditors accredited by the SEC, to show that the use of the minerals does not directly or indirectly provide conflict financing to illegal armed groups. There are indications that the Due Diligence requirements could well follow the principles of the OECD and UN guidelines described below, which means that the iTSCi scheme will play a prominent part in Due Diligence. Industry, including the T.I.C., is providing input to the SEC as it develops the regulations.

It is worth noting that the need for increasingly stringent Due Diligence follows an almost identical pattern to the proposed set of Procedures for the T.I.C. presented by John Crawley at the Fiftieth General Assembly in Tallinn in 2009, an indication that the T.I.C. had the right approach.

OECD

In December 2009, the Organisation for Economic Cooperation and Development (OECD) commenced the development of a 'Due Diligence Guidance for Responsible Supply Chains of Minerals from Conflict-Affected and High-Risk Areas'. Several members of the T.I.C. Working Group have been involved in the development of these guidelines. There have been three official consultations with all the stakeholders participating - Industry, Governments (both from the DRC and donor countries) and Civic Societies. Two were held in Paris and a 'final' meeting took place in Nairobi in late September 2010. There have also been a considerable amount of 'behind the scene' negotiations.

The guidelines are in two parts – a general set of guidelines and a 'supplement' related to tantalum, tin and tungsten. The OECD plans to incorporate a supplement on gold in the future. Until that is done, the guidelines will be missing the most important contributor to the linkage between mining and conflict financing.

The documents are currently in their final draft, and they await formal approval by member states prior to their release. They provide a fairly comprehensive set of guidelines (that is, 'voluntary') laying out the requirements and methodology of carrying out appropriate Due Diligence throughout the supply chain, including the use of the iTSCi scheme for traceability. Members need to be aware that Due Diligence - in whatever form - will require considerably more transparency that at present, and will include independent third party audits for it to be acceptable, not only to our customers, but also to society at large. These will be the, understandable, price of doing business in central Africa.

The United Nations

Resulting from the various reports by United Nations Groups of Experts, the UN reconstituted the Group of Experts with a mandate to develop their own set of requirements for Due Diligence. The T.I.C. and ITRI have both been peripheral to the preparation of this document, but we understand that the UN and the OECD drafters have maintained a close relationship, and that the two documents will be compatible.

ICGLR

The International Conference on the Great Lakes Region (ICGLR) has been in existence for approximately five years, and consists of representatives from eleven central African countries, including those countries most impacted by the current issue - the DRC, Rwanda, Burundi, Tanzania, Kenya and Uganda.

Essentially, with the financial and technical support of Germany and Canada, the ICGLR has been developing a Regional Certification Scheme, which is expected to be approved mid December at an ICGLR summit in Lusaka. This regional certificate will be required prior to the export of any tantalum - and several other - minerals from the member states, and its purpose is to minimise or eradicate inter-country smuggling.

While the scheme will rely heavily on mine certification, covering not only the issue of conflict mines, but also covering human rights, environmental and other related issues, a Memorandum of Understanding has been signed between the ICGLR and ITRI to incorporate the iTSCi scheme as the preferred traceability procedure.

The German geological survey, BGR, has been actively supporting the ICGLR and other processes. Its approach has been toward mine certification rather than traceability, including the 'fingerprinting' process[15] although it is unclear at this time whether this will be adopted in the final ICGLR scheme. Nonetheless the BGR approach could be likened to Phase 3 of the iTSCi scheme, and the potential to combine the two remains an option.

The ICGLR and OECD have collaborated in the preparation of their documents, as have the UN. Essentially all three are moving closely to a common set of principles: furthermore, while the SEC regulations are as yet unknown, it does appear that they are leaning heavily toward not developing a separate set of Due Diligence guidelines. This is to be applauded - conflicting requirements would be a recipe for disaster as no one in the supply chain would be able to determine which took precedence.

Quo Vadis?

We have come a long way in less than two years: the T.I.C. has its own policy, we are working closely with ITRI on the iTSCi scheme, and with EICC/GeSI on the Processor Validation process. We have worked closely with the OECD on its guidelines, and to a lesser extent with the UN and ICGLR.

So, what's left?

Obviously we must await the completion and publication of the various bodies - the OECD and ICGLR in the near future, and the SEC regulations - before we can be certain of their contents. That said, two things are already clear:

- The key date, as far as EICC/GeSI is concerned, is March 31st 2011. Material not tagged through the iTSCi scheme and ready for export by that date will simply not be acceptable, and processors buying non-tagged material will not be validated.
- Consequently iTSCi has to be rolled out throughout the DRC and other central African countries at a much faster rate than originally envisioned. Not only is this a massive technical and management challenge, it will also take a massive capital infusion, estimated to be between US$6 and 8 million.

The T.I.C. clearly stated that the US$125,000 funding to iTSCi was a 'one-off': this will not change. While the Working Group will continue to have a representational role on iTSCi, it will not provide additional funding directly. Individual members will be required to assist in funding the roll-out capital costs. Operating costs are to be met from export levies - in the case of tantalum, US$1 per pound contained Ta_2O_5 for all central African material. We now propose this to be collected jointly from exporters and processors, each paying a levy of US$0.50 per pound Ta_2O_5.

Finally, the T.I.C. can not demand that its members participate in the iTSCi scheme, by paying the levy as required. However, our major end-user group has made it abundantly clear:

'No tag, no sale'

The choice is yours.

1 *This is the author's best estimate (see also Figure 1), and must not be regarded as an output of (or an opinion of) the T.I.C. which prepares statistics on a worldwide not a regional basis*

2 *Garrett N. and Mitchell H. (Resource Consulting Services, UK) 'Trading Conflict for Development', document commissioned by UK's Department for International Development, April 2009*

3 *One standard gold bar (400 ounces) is currently worth MORE than a full container load (18 tonnes) of tantalum concentrates!*

4 *UN Report of Experts S/2010/596 published November 2010, p. 81*

5 *The Times on line, September 2010*

6 *UN Report of Experts S/2002/1146*

7 *The BBC on line http://news.bbc.co.uk/2/hi/africa/country_profiles/1072684.stm accessed October 2010*

8 *UN Report of Experts S/2008/773*

9 *ITRI Ltd - previously the International Tin Research Institute - is a membership based organisation representing major tin producers and smelters and is the premier source of tin related information*

10 *'iTSCi': a phased and constructive approach towards improved Due Diligence, Governance and Traceability in cooperation with the 'Ministère des Mines de la République Démocratique du Congo'. ITRI website www.itri.co.uk*

11 *Hayes K., Update on the ITRI Tin Supply Chain Initiative (iTSCi) in the Democratic Republic of the Congo and Rwanda. Presentation to the Fifty-first General Assembly of the T.I.C., Lake Tahoe, October 2010*

12 *Meyers J., OEM requirements for responsible sourcing in the metals supply chain. Presentation to the Fifty-first General Assembly of the T.I.C., Lake Tahoe, October 2010*

13 *The Road to Corporate Responsibility: an Automotive Conference – Troy MI, January 2011*

14 *The complete relevant section of the Provisions was provided to all members of the T.I.C. in an e-mail dated July 27th 2010*

15 *Melcher F., Graupner T., Sitnikova M. and Oberthür T., Fingerprinting the origin of tantalum ores. Paper presented at the Forty-ninth General Assembly of the T.I.C., Shanghai, October 2008*

MEMBER COMPANY NEWS

Resignations

The following companies have resigned from membership since the last General Assembly: Gippsland Ltd, Hitachi AIC Inc, Kivu Metals, Noventa Ltd, H.C. Starck GmbH (Germany), H.C. Starck Inc (U.S.A.), H.C. Starck Co. Ltd (Thailand) and Tertiary Minerals plc.

H.C. Starck has consolidated the membership of its group of companies under the company H.C. Starck Ltd (Japan).

Terminations

The membership of the following companies has been terminated by decision of the Executive Committee since the last General Assembly: JSC Irtysh Chemical Metallurgic Plant and Northwest Institute Non-ferrous Metals Research.

New members

Two companies were elected to membership by the Fifty-first General Assembly:

A.S. Metallurgy (Liverpool)
Address: 20 Sefton Business Park, Netherton,
Liverpool L30 1RD, England
Nominated delegate: Mr K. Alex Stewart
Tel.: +44 151 523 5438, Fax: +44 151 523 3760
e-mail: alex.stewart@alexstewartinternational.com
Web sites: www.alexstewartinternational.com,
www.asmetallurgy.com

Eramet
Address: Tour Maine Montparnasse, 33 avenue du Maine,
75755 Paris cedex 15, France
Nominated delegate: Mr Antoine Greco
Tel.: +33 1 45 38 42 00, Fax: +33 1 45 38 41 50
e-mail: antoine.greco@erametgroup.com
Web site: www.eramet.fr

Changes in member contact details

Honeywell Specialty Chemicals Seelze GmbH
The Fifty-first General Assembly approved the transfer of T.I.C. membership from Honeywell Belgium N.V. to Honeywell Specialty Chemicals Seelze GmbH. The nominated delegate is Dr Harry Zumaqué.
Address: Wunstorfer Strasse 40, 30926 Seelze, Germany
Tel.: +49 5137 999 812, Fax: +49 5137 999 868
E-mail: harry.zumaque@honeywell.com

Kemet Electronics
Following a change of department within Kemet, Dr Werner Lohwasser is no longer the delegate to the T.I.C. for his company. Kemet has appointed Dr Daniel Persico as nominated delegate. His e-mail is danielpersico@kemet.com.

H.C. Starck Ltd (Japan)
On January 1st 2011, Dr Karlheinz Reichert will be taking on a new responsibility within H.C. Starck GmbH, thereby returning to Germany. The delegate to the T.I.C. for H.C. Starck Ltd (Japan) will become Mr Yasukazu Muto.
His e-mail address is yasukazu.muto@hcstarck.com.