

Argentina 19th Edition
**Gold, Silver
& Copper**



PANORAMA
MINERO

DECEMBER 3 & 4, 2025
Buenos Aires, Argentina

DAY | DECEMBER 3

9:00–10:00 AM — Registration & Welcome Coffee **Networking and executive engagement space**

Start of the event. First gathering point for public and private decision-makers, sponsors, international stakeholders, media and specialized organizations.

10:10–10:45 AM — Country Moment: Mining Policy, Economy, Investment, and International Projection **Year-end dialogue with the highest national mining authorities**

Opening segment that examines the National Government's roadmap toward 2026 and the role of mining in an unprecedented context of public acceptance. It will analyze the contributions of macroeconomic stability, investment flows, the RIGI, and federal coordination, along with the sector's strategic positioning in the national and international landscape.

» **Luis Lucero** — Secretary of Mining of the Argentine Republic

» **Daniel González** — Secretary of Energy and Mining Coordination of the Argentine Republic

Moderation: **Ernesto Cussianovich** — Director of Natural Resources, Poliarquía — Member of the 2025 Committee

10:45–11:45 AM — The State of Argentina's Productive System at a Defining Moment for Major Industries **Shared agenda for long-term competitiveness and productivity**

The sectors driving Argentina's economic growth will outline a diagnosis of current activity, the common challenges shared by industries such as mining, agriculture and oil & gas, and the needs related to enabling infrastructure, human capital, technology, production and financing. The expected outcome of the panel is a short list of shared priorities and concrete measures to enhance productivity and export capacity. What are these key productive sectors experiencing, and what binds together the most dynamic drivers of the Argentine economy?

- » **Roberto Cacciola** — President, Argentine Chamber of Mining Companies (CAEM)
- » **Martín Rappallini** — President, Argentine Industrial Union (UIA)
- » **Nicolás Pino** — President, Argentine Rural Society (SRA)
- » **Ricardo Hösel** — CEO, Oldelval

Moderación: **Luciana Geuna** — Journalist and Host, TN and Olga
Sebastián Penelli — Journalist, *Ámbito Financiero*

11:45–12:15 PM — Geopolitics: Argentina's Mining Industry and Its Position in the Global Landscape

The world enters a new era: consequences and opportunities of the evolving international context for the mining sector

The fragmentation of the international landscape is creating both opportunities and challenges. Will Argentina be able to seize them?

- » **Felipe de la Balze** — ANCMYP / CARI

12:15–2:00 PM — Brunch & Networking

2:00–3:10 PM — From the First Mining Cycle to the Next Decade: Decisions Required for a Step-Change in Scale

Lessons learned, shared experiences and concrete steps to shorten timelines, strengthen capabilities and structure project advancement

Industry leaders from the early years of large-scale mining, together with executives driving the new phase of sector development, will outline what has endured, what was missing and what must be corrected to bring projects into full development. The session will highlight the sequence and timing of permits, priority infrastructure and works, supplier development and local employment, community relations, environmental management, financing and the long-term legacy of mining. The discussion will produce a summary of what may unfold as new mines come online, with clear priorities, pitfalls to avoid and practical strategies to move from projects to operations that generate social value and economic growth.

- » **Patricio Jones** — Director, Pistos Tierras Raras, Brazil
- » **Julián Rooney** — Member of the Executive Team for the Startup of Mina Alumbra / CARI
- » **Michael Meding** — VP McEwen Copper & General Manager, Los Azules
- » **Javier Robeto** — VP Aldebaran Resources & Country Manager, Altar
- » **Sonia Delgado** — Executive Director, Challenger Gold

Moderación: **Fernando Heredia** — Mining Journalist, Forbes Argentina
Sabrina Pont — Mining Journalist

3:10–4:20 PM — Mining: Infrastructure, Its Financing and Its Legacy to Society **Investment that enables competitiveness and development**

This session will examine the symbiotic relationship between large-scale mining investment and the modernization of Argentina's infrastructure: how mining projects act as catalysts for logistical corridors, energy capacity, connectivity and social facilities in mining regions. A comprehensive, multidisciplinary perspective on the rules, financing mechanisms and institutional frameworks required to materialize infrastructure in a sustainable, efficient and strategic manner, leaving long-lasting installed capacity that strengthens territorial economic development.

- » **Manuela Adl** — Senior Regional Manager, Southern Cone, International Finance Corporation (IFC)
- » **Sebastián Luegmayer** — Partner, O'Farrell
- » **Shawn Doyle** — LatAm Partner, McCarthy Tétrault
- » **Pablo Iglesias Rumbo** — Cooperation Attaché, European Union
- » **Jorge Ariza** — Partner, Infrastructure Practice, O'Farrell

Moderación: **Alberto Carlocchia** — Coordinator, Mining Committee, CCAC

4:20–4:45 PM — Break: Coffee Pause & Networking **Coffee service and re-entry for the final conference block of Day 1**

4:45–5:45 PM — Infrastructure for Competitiveness: The Cross-Cutting Axis of Argentina's Productive Sector **Mining as an anchor and partner in generating structural value and developing logistical and energy corridors**

Experts from key sectors will provide a technical assessment of the infrastructure Argentina needs to turn projects into sustainable exports. The session will address diagnostics and priorities for railways and ports, strategic road corridors, power capacity and transmission lines, water management and resilience. It will also explore how mining can coordinate with other industries to scale productivity by integrating financing, operations and joint strategies.

- » **Alejandro Núñez** — President, Belgrano Cargas y Logística S.A.
- » **Emilio Miranda** — Supply Chain Manager, Los Azules — McEwen Copper
- » **Pablo Bereciartúa** — Minister of Infrastructure and Mobility of the City of Buenos Aires / Argentine Center of Engineers (CAI)
- » **Franco Mignacco** — President, Mining Department, Argentine Industrial Union (UIA)

Moderación: **Silvina Córdoba** — Senior Public Affairs Consultant / Former Minister of Production of Santa Cruz

5:45–6:10 PM — GMXT: First Corporate Presentation in Argentina

Freight rail for major industries: signals, operating model and regional outlook

GMXT, a company of Grupo México and one of the leading freight rail operators in North America, will present its interest in contributing to the region's railway development and the opportunities it identifies to support the growth of major industries. The presentation will outline how the group operates globally, its regional presence in Mexico and the United States, its operating standards and management model. It will also address the investments under evaluation and the enabling conditions required to advance, with a focus on strengthening logistical efficiency and enhancing the competitiveness of productive industries.

» **Bernardo Ayala** — CEO, Grupo México Transportes USA (GMXT USA)

6:10–6:45 PM — Managing Expectations: Balancing Enthusiasm, Projections and Reality in a New Era for Mining

Closing conclusions delivered by the 2025 Honorary Committee

Closing segment in which representatives of the 2025 Committee will synthesize the main themes of the day and provide an analytical framework to help structure the public conversation around mining. The discussion will address what the industry can deliver, in what timeframes and under which conditions, emphasizing its relationship with workers, suppliers, academia, communities and stakeholders in a context of expansion. The panel will also outline key policies, projects and strategic guidelines to strengthen the sector's relevance and impact in the regions where it operates.

» **Juan Biset** — External Consultant, OECD / CARI — 2025 Honorary Committee

» **Mario Hernández** — Sustainability Manager, Los Azules – McEwen Copper — Chair, 2025 Committee

» **Ernesto Cussianovich** — Director of Natural Resources, Energy and Environment, Poliarquía — 2025 Committee

7:00 PM — End of Conference Program — Day 1

Followed by the start of the Cocktail Party – “Mining Awards Night”

8:00 PM — Close — Dinner Show “Mining Awards Night”

Annual Awards Ceremony of the Argentine Mining Industry

DAY 2 | DECEMBER 4

8:00–9:00 AM — Morning Coffee & Networking: Welcome to Day 2

Early-morning gathering with mining executives

9:00–9:25 AM — Uranium: Strategic Importance and High Relevance in the Current

Context

Uranium for nuclear power generation – global and Argentine overview

Global uranium overview: resource base, production levels, extraction methodologies and demand scenarios under nuclear power expansion. Market assessment and signals on pricing and supply. Local focus: Argentina's resources and projects, technical, environmental and social conditions for production, and the regulatory framework required to ensure supply security and competitiveness.

» **Luis López** – Uranium Resources Specialist, National Atomic Energy Commission (CNEA)

9:25–10:00 AM – Rare Earth Elements at the Center of the Geostrategic and Technological Agenda

Why they are gaining prominence and what role Argentina could play

Rare earth elements have become critical inputs for the energy transition, advanced technologies and strategic sectors such as defense, concentrating geopolitical influence due to their industrial relevance and high economic value. The session will examine their key applications, market evolution and global and domestic supply distribution, along with SEGEMAR's geological insights on current occurrences and deposits in Argentina. It will also present the country's potential in this field and the opportunities –if any– to attract mining investment as a basis for potential integration into strategic value chains for national economic development.

» **Miguel Soler** – Senior Mining Consultant

» **Martín Gozávez** – Director, IGRM, Geological and Mining Survey of Argentina (SEGEMAR)

Moderación: **Eduardo Barrera** – Advisor, European Union – Former Secretary of Mining of Argentina

10:00–10:30 AM – 20 Years of Veladero: A Legacy of Value for Argentine Mining

Two decades of development, learning and continuous improvement

Presentation on Veladero's trajectory and its contribution to the growth of Argentina's mining industry. The session will review key milestones, lessons learned, job creation, infrastructure, community engagement and the challenges shaping the project's next stage.

» **Marcelo Álvarez** – Executive Director of Government Affairs for South America, Barrick Mining

» **Yuri Sáenz More** – General Manager, Veladero

10:30–11:00 AM – Coffee Break & Networking

11:00–11:45 AM – Exploration Outlook in Argentina's Mining Sector

Regional exploration trends and measures to sustain the project pipeline

A comprehensive overview of Argentina's exploration landscape, bringing together two complementary perspectives. The geological–technical view will address priority target areas, methodologies, project maturity and field signals that help project the future of mining. The GEMERA perspective will outline the regulatory framework, permitting processes, operational challenges, and the need for risk capital and specialized services to strengthen early-stage exploration and sustain the project pipeline. The session will present key priorities to drive high-quality discoveries and reinvigorate exploration, also considering current developments in the earliest stages of the industry's project cycle.

» **Cintia Marquetti** — Regional Metals Director, Fortescue

» **Michael Meding** — President, Argentine Explorers Association (GEMERA)

11:45–12:00 PM — Epiroc: Accelerating the Shift Toward Smart Mining

Integrated and agnostic solutions to enhance productivity and competitiveness in the Southern Cone

How the mining industry is evolving toward smarter, more sustainable and more competitive operating models, and the role that integrated and technology-agnostic solutions play in this transition. The session will examine key trends including automation, digitalization and electrification, as well as the importance of interoperability to address current and future challenges. The objective is to provide a strategic perspective on how to accelerate the transformation of mining in the Southern Cone by combining technological innovation with practices that promote efficiency, safety and sustainability.

» **Patricio Lagarini Meyer** — Interim General Manager, Epiroc Southern Cone

12:00–12:20 PM — PwC: How to Create Value with Artificial Intelligence

What new directions will the rise of AI set for the way mining companies operate and make decisions?

Artificial intelligence has become a key lever for improving operational efficiency and enhancing decision-making across the mining value chain. Its potential does not materialize on its own, it requires organizational change, proper governance and a clear vision to capture sustained business value. PwC, a global leader in AI implementation and governance, will share experiences and lessons learned on how AI can unlock concrete opportunities across virtually all mining processes, along with key recommendations to harness its full potential.

» **Roberto Cruz** — AI & Digital Innovation Partner, PwC Argentina

12:20–12:40 PM — From Mine to Future: The Importance of Copper in the Energy Transition

Latin American perspectives, opportunities and challenges for the region

A strategic overview of global decarbonization and electrification goals, with a focus on the critical role of copper in the shift toward clean energy. The session will examine the region's competitive advantages and strategic reserves, investment opportunities, and the main socio-environmental and regulatory factors shaping project development. An integrated perspective on how Latin America can position itself as a central player in this paradigm shift, within an increasingly demanding global context for mineral supply.

» **Thaís Sousa** — Business Development Manager, Argus Media

12:40–1:30 PM — Mining Investment Law and RIGI from Public and Private Sector Perspectives

Analysis of promotional regimes for mining in Argentina

Argentina is working to become a reliable and competitive country capable of attracting investment. Since 1993, it has had Law 24,196, created specifically to promote investment in the sector. In line with this objective, following the enactment of the “Ley Bases” in 2024, the Large Investment Incentives Regime (RIGI) was incorporated, aimed at attracting projects across various industries. As the closing segment of the event, the presentation will delve into how both regimes coexist, what requirements and benefits they offer, and the implications for project profitability.

» **María Eugenia Bais** — National Director of Mining Investments

» **Daniel Jerez** — Specialist in Project Evaluation and Mining Economics

» **Tay Such** — Specialist in Mining Investment Project Evaluation

Moderation: **Santiago Dondo** — Consultant, Specialist in Mining and Public Policy

1:30 PM — Closing Segment — Day 2

Informal year-end ceremony

Year-end brunch and gathering; farewell space for the mining sector in 2025.

END OF EVENT

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