

FACT SHEET June 2024

SOCIAL INDICATORS IN MINING

COAL | DIAMONDS | GOLD | PGMS



MINERALS COUNCIL
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Sibanye-Stillwater



Thungela Resources



Anglo Platinum - Mogalakwena



Petra Diamonds - Finsch

COAL

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SOCIAL INDICATORS IN MINING

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MINERALS COUNCIL SOUTH AFRICA

#MiningMatters

The Minerals Council commissioned a report to establish the positive impact mining has on employment, training and development, socio-economic development and enterprise development across various sectors in 2023. In total, 12 of the Minerals Council's larger members were surveyed. This fact sheet summarises the findings and shows why mining matters to all South Africans.

This fact sheet focuses on the research into the coal sector.

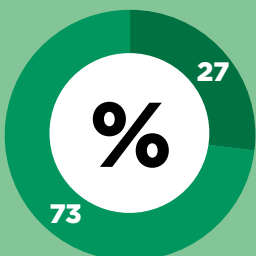


Thungela Resources

SECTOR REPRESENTATION

Our survey assessed the performance of two substantial coal companies, though they employ only about 27% of employees in the sector, based on the information in the Minerals Council's 2023 Facts and Figures Pocketbook. Our ability to survey more was limited by the fact that much of the coal sector is operated by unlisted companies that do not produce publicly available annual reports.

Coal



Coal assessed
Rest of sector

WOMEN IN MINING

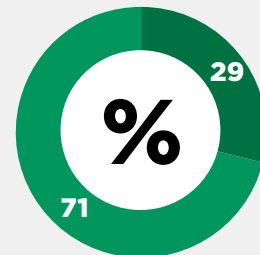
About 29% of the full-time workforce at the two coal companies covered in this research are women. It should be recalled that, until the 1990s, no women were permitted to work in core mining jobs in South Africa.

Nonetheless, the number of women employed in coal and all other sectors of the industry is significant. Many of the companies explicitly stress the importance to their businesses of continuing to increase the number of women they employ.

Mining companies are making their operations more conducive

to women working in the sector. Companies have policies on zero tolerance of gender-based violence, discrimination and bullying. Great strides are being made in adopting personal protective equipment designed for women.

Women in mining - Coal



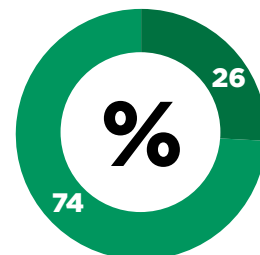
Women
Men



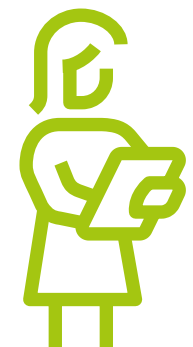
WOMEN IN MANAGEMENT

Women account for 26% of the assessed coal companies' management. This is a significant proportion in a sector that was previously far more male-dominated.

Women in management - Coal



Women
Men



TRAINING AND DEVELOPMENT

The coal companies spent R41,478 per full-time employee on training and development in the relevant financial year.

Training spend in mining has always been substantial in the democratic era. A benchmark for training spend of 5% of payroll was set in the first iteration of the Mining Charter in

2004. Companies report on this to the Department of Mineral Resources and Energy (DMRE) annually and usually exceed this amount, spending an estimated R7 billion a year on training and development.

R41,478

per full time employee on training and development

BURSARIES AND LEARNERSHIPS










One of the coal companies reported spending R22.1 million on funding 174 students. Women make up 53% of the 174 bursary recipients.

It had 443 learnership candidates, of whom 46% were women and 95% HDSAs.

SOCIO-ECONOMIC DEVELOPMENT

The assessed coal companies spent R194 million on socio-economic development projects, mostly in their communities, in the relevant financial years. Their focus has tended to be on education, health and infrastructure.

In education, examples drawn from the various companies' public reports included:

 Providing laptops for 449 learners.	 A teacher training programme.	 Hybrid maths and English education for 28 high schools.	 Food garden for 300 learners.	 Career expo to benefit 1,592 learners.
School shoes and sanitary towels for 11,000 learners.	WiFi connection for 37 schools, establishment of 20 school laboratories and 14 community hot spots.	Recruitment and placement of 15 early childhood development practitioners.	Winter camps for 3,165 grade 12 learners.	A holistic education programme implemented in partnership with the Department of Basic Education has improved educational facilities, school management systems and learner outcomes at 24 primary and high schools, and 26 early childhood development centres.
 79 individuals worked towards their postgraduate masters and honours degrees.	 Community scholarship scheme for 26 students.	 12-month learnership programme for people with disabilities.	 2022 saw an increase in matriculant pass rates to 86.2% from 80% in 2021.	

ENTERPRISE DEVELOPMENT

The two companies reported they had spent R305 million on enterprise development projects.

One example provided is a new enterprise and supplier development programme which invested R13.7 million in 252 beneficiary firms. The initiative also offers grant funding to beneficiaries to grow their businesses through the acquisition of equipment.



R305 million spent on enterprise development

CONCLUSION

We believe the survey paints an informative picture of the breadth and depth of the transformation efforts that have become the standard way of operating for most mining companies, and for Minerals Council members.

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DIAMONDS

FACT SHEET June 2024

SOCIAL INDICATORS IN MINING

De Beers - Venetia



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This fact sheet focuses on the research into the diamond sector.

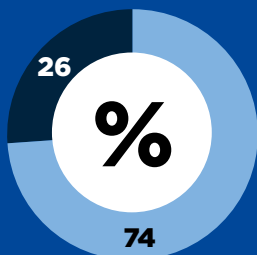


Petra Diamonds - Finsch

SECTOR REPRESENTATION

Our survey assessed the performance of two diamond companies that employ 74% of employees in the sector, based on the information in the Minerals Council's 2023 Facts and Figures Pocketbook.

Diamonds



■ Diamonds assessed
■ Rest of sector

WOMEN IN MINING

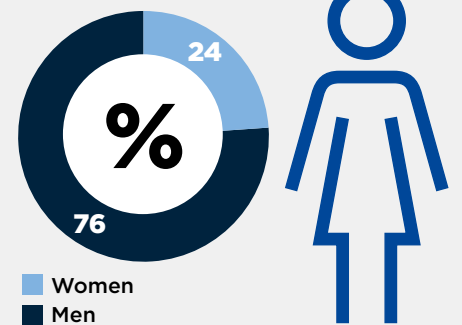
About 24% of the full-time workforce at the two diamond companies covered in this research are women. It should be recalled that, until the 1990s, no women were permitted to work in core mining jobs in South Africa.

Nonetheless, the number of women employed in diamonds and all other sectors of the industry is significant. Many of the companies explicitly stress the importance to their businesses of continuing to increase the number of women they employ.

Mining companies are making their operations more conducive to women working in the sector.

Companies have policies on zero tolerance of gender-based violence, discrimination, and bullying. Great strides are being made in adopting personal protective equipment designed for women.

Women in mining - Diamonds

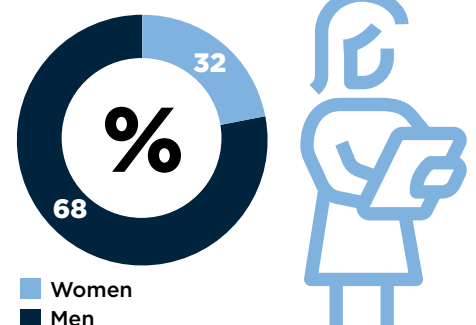


WOMEN IN MANAGEMENT

Women account for 32% of the assessed diamond companies' management.

The percentage of women in management is higher than the percentage of women employed. This, we believe, is a further indication of the seriousness with which companies are taking the need to make mining a more conducive environment for women by raising the number of female managers.

Women in management - Diamonds



TRAINING AND DEVELOPMENT

The diamond companies spent R151 million on training in their respective financial years, amounting to R26,137 per full-time employee.

Training spend in mining has always been substantial in the democratic era. A benchmark for training spend of 5% of payroll was set in the first iteration of the Mining Charter in 2004. Companies report on this to the Department of Mineral Resources and Energy (DMRE) annually and usually exceed this amount, spending an estimated R7 billion a year on training and development.

BURSARIES AND LEARNERSHIPS

The smaller of the two diamond companies reported supporting 14 students with bursaries, of whom 10 were women. Of the 14, 13 were Historically Disadvantaged South Africans (HDSAs). The other company did not report this information. These bursaries cover the cost of studies, accommodation, and allowances. Degrees and courses being studied include B Ed; BA Industrial Psychology and English; Metallurgical Engineering; BSc

Computer Science; BSc Chemical Engineering; BSc Geology (Hons); Industrial Engineering (Hons); and Mechanical Engineering.

The two companies had 639 learnership candidates. At the smaller company 34% of the learnership candidates were women.



SOCIO-ECONOMIC DEVELOPMENT

The assessed diamond companies spent R166 million on socio-economic development projects, mostly in their communities, in the relevant financial years. Their focus has tended to be on education, health, and infrastructure.

In education, examples drawn from the two companies' public reports included that they:



Provided bursaries, as well as other educational and learnership investments.



Supported learning institutions to improve outcomes from educational initiatives focusing on resources for a better understanding of science, mathematics, engineering, and technology.



Built primary school and technical high school infrastructure.

Supported learners at five primary and secondary schools, mainly through mathematics and science school support programmes.



Awarded 39 scholarships to top performing learners from local schools.

Provided scholarships and tertiary education support, including a bursary scheme, a graduate development programme and provided practical experience through an experiential training programme.

Spent R8.1 million on community training and development. This included skills training for community members, such as computer literacy, plumbing, basic building techniques and carpentry, sewing, driver's licence and agricultural training.

In health, the diamond companies:



Worked with the London School of Hygiene and Tropical Medicine in 2021 to create a baseline health assessment for host communities.



Through the HIV/AIDS management programme reduced the TB incidence rates in the region from **74 per 100,000 people in 2021 to 51 per 100,000 in 2022.**

ENTERPRISE DEVELOPMENT

The larger diamond company reported the detail of its enterprise development funding. It spent R125 million on supporting 178 small businesses that led to the creation of 1,784 jobs.

In respect of one firm, small enterprises are selected for a three-year programme which covers strategy, entrepreneurship,

sales, marketing, and personal development. Women owned 40% of the businesses that graduated through the programme in 2022.

1,784

The number of jobs created through support for 178 small businesses

CONCLUSION

We believe the survey paints an informative picture of the breadth and depth of the transformation efforts that have become the standard way of operating for most mining companies, and for Minerals Council members.

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GOLD

FACT SHEET June 2024

SOCIAL INDICATORS IN MINING

Gold Fields - South Deep



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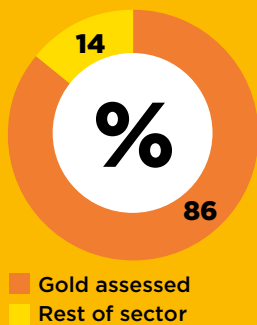
This fact sheet focuses on the research into the gold sector.



SECTOR REPRESENTATION

Our survey assessed the performance of four gold companies. We estimate they employ about 86% of the gold sector's workforce, based on the Minerals Council's Facts and Figures Pocketbook.

Gold



WOMEN IN MINING

About 18% of the full-time workforce at the four gold companies are women. In a sector where all mining is carried out at deep levels, it can be understood why the proportion is below the industry average of 19%. It should be recalled that, until the 1990s, no women were allowed by law to work in core mining jobs in South Africa.

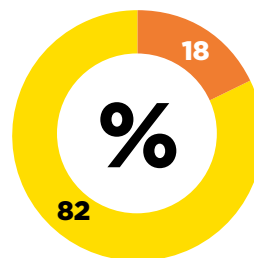
Nonetheless, the number of women employed in gold and all other sectors of the industry is significant. Many of the companies explicitly stress the importance to their businesses of continuing to increase the number of women they employ. Mining companies are making their operations more conducive to women working in the sector. Companies have policies on zero tolerance of gender-based violence, discrimination and bullying. Great strides are being made in adopting personal protective equipment designed for women.

About

18%

of the full-time workforce at the four gold companies are women.

Women in mining - Gold



Women
Men



WOMEN IN MANAGEMENT

Women comprise 23% of the assessed gold companies' management.

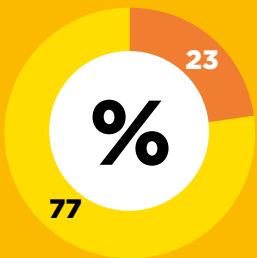
The percentage of women in management is higher than the percentage of women employed. This, we believe, is a further indication of the seriousness with which companies are taking the need to make mining a more conducive environment for women by raising the number of female managers.

23%
of the assessed gold companies' management comprise women.



DRD GOLD - Far West Gold Recoveries

Women in management - Gold



■ Women
■ Men



Sibanye-Stillwater - SA gold operation

TRAINING AND DEVELOPMENT

The four gold companies spent R23,279 per full-time employee on training and development in the relevant financial years.

Training spend in mining has always been substantial in the democratic era. A benchmark for training spend of 5% of payroll was set in the first iteration of the Mining Charter in 2004. Companies report on this to the Department of Mineral Resources and Energy (DMRE) annually and usually exceed this amount, spending an estimated R7 billion a year on training and development.

BURSARIES AND LEARNERSHIPS

Three of the four surveyed companies reported spending R55.9 million on funding bursaries for 715 students. Two of the companies reported that between 42% - 45% of their bursaries were for women.

Three of the companies recorded 976 learnerships.

These are appreciable overall numbers. The proportions of women suggest that it is easier to find female candidates for graduate and post-graduate training than those taking up learnership opportunities. It is to be hoped that the latter number will increase as gold mining's reputation as a suitable environment for women in core mining positions improves.



Sibanye-Stillwater - Gauteng Gold Operation

Socio-economic development



The four gold companies spent **R570 million on socio-economic development projects**, mostly in their communities, in their relevant financial years. As these examples show, their focus has tended to be on education, health and infrastructure.



398

Learners took advantage of maths, science and accountancy programmes

Partnership with the Wits School of Chemical and Metallurgical Engineering worth **R1.2 million per year over a five-year period**



801

Grade 10 to 12 learners and teachers achieved excellent maths, science and English results



Funding of **R5 million** to schools in the 2022 academic year



Full scholarships awarded to the top **14 matriculants from disadvantaged schools**



620

grade 10, 11 and 12 learners in 2022 enrolled in a R7.5 million three-year project



Two trusts have invested **R15 million and R91 million** in community and education projects, respectively since 2010

ENTERPRISE DEVELOPMENT

Only two of the companies reported the detail of the funding of their enterprise development work. They spent R98 million in this regard. One company supported 106 small businesses. Three companies reported that their enterprise development efforts had led to the creation of 6,186 jobs.

One company committed R14 million for supplier development aimed at providing growth finance to suppliers

who are investment-ready but struggle to get funding elsewhere.

Another's start-up programme will give 100 entrepreneurs in host communities an opportunity to present their business cases. Successful applicants will participate in a mentorship programme, practical skills development on technology, receive business support grants and be given opportunities to do business with the mining company.

One advertises opportunities on its website and holds bi-weekly meetings with small, medium and micro-enterprises to discuss opportunities and provide support.

A R65.5 million Enterprise Development Fund helps local entrepreneurs join one of the company's supply chain. A 25-year-old beneficiary of the fund provides transportation of mining materials. She stated that the opportunity had been life changing, especially as a woman in a male-dominated industry.

Together with procurement programmes for Historically Disadvantaged South Africans (HDSAs), mining companies' enterprise development programmes have contributed to building a major supplier industry to South Africa's mining sector over the past 20 years and more.



R98 million

The amount two companies spent on enterprise development in 2023.

CONCLUSION

We believe the survey paints an informative picture of the breadth and depth of the transformation efforts that have become the standard way of operating for most mining companies, and for Minerals Council members.



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PLATINUM GROUP METALS - PGMS

FACT SHEET June 2024

SOCIAL INDICATORS IN MINING

Anglo American Platinum - Mototolo



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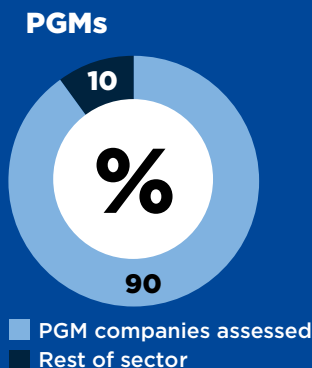
This fact sheet focuses on the research into the platinum group metals (PGMs) sector.



Sibanye-Stillwater - SA PGM operations

SECTOR REPRESENTATION

Our survey assessed the performance of four PGM companies that employ 90% of employees in the sector, based on the information in the Minerals Council's 2023 Facts and Figures Pocketbook.



WOMEN IN MINING

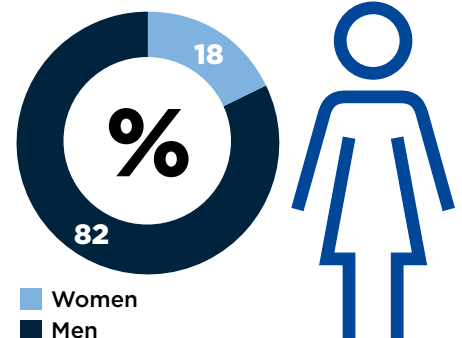
About 18% of the full-time workforce at the four PGM companies covered in this research are women. It should be recalled that, until the 1990s, no women were permitted to work in core mining jobs in South Africa.

The number of women employed in PGMs and all other sectors of the industry is significant. Many of the companies explicitly stress the importance to their businesses of continuing to increase the number of women they employ.

Mining companies are making their operations more conducive to women working in the sector. Companies have policies on zero tolerance of gender-based violence, discrimination and bullying. Great strides are being made in adopting personal protective equipment designed for women.

About **18%** of the full-time workforce at the four PGM companies are women.

Women in mining - PGMs



WOMEN IN MANAGEMENT

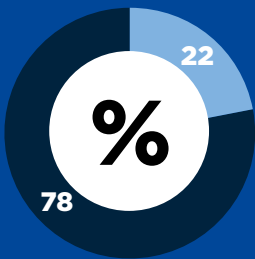
Women account for 22% of the assessed PGM companies' management.

The percentage of women in management is higher than the percentage of women employed. This, we believe, is a further indication of the seriousness with which companies are taking the need to make mining a more conducive environment for women by raising the number of female managers.



Implats – Impala Rustenburg

Women in management - PGMs



■ Women
■ Men



Northam Platinum – Booyendal

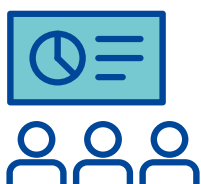
22%

of the assessed PGM companies' management comprise women.

TRAINING AND DEVELOPMENT

PGM companies spent R2.8 billion on training in their respective financial years, amounting to R26,893 per full-time employee.

Training spend in mining has always been substantial in the democratic era. A benchmark for training spend of 5% of payroll was set in the first iteration of the Mining Charter in 2004. Companies report on this to the Department of Mineral Resources and Energy (DMRE) annually and usually exceed this amount, spending an estimated R7 billion a year on training and development.



BURSARIES AND LEARNERSHIPS

Two PGM companies reported spending R87.2 million on bursaries. The four companies, in aggregate, supported 514 bursary recipients. Two companies reported that 36% and 42% of bursary recipients were women.

One reported that 78% were Historically Disadvantaged South Africans (HDSAs). Not all companies reported this information.

The four companies had 1,935 learnership candidates, of which 26% to 40% were women. And one company stated that 99% were HDSAs.

The four companies had 1,935 learnership candidates.



Anglo American Platinum – Dishaba

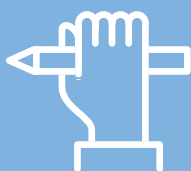
Socio-economic development



The four PGM companies spent **R1.6 billion on socio-economic development projects**, mostly in their communities, in the relevant financial years. Their focus has tended to be on education, health and infrastructure.

In education, examples drawn from the four companies' public reports included:

Support for early childhood development, leadership and character-building programmes; and learner support and development. **Support for 16,575 learners and 501 teachers, and school governing bodies and principals. This was delivered in partnership with the Department of Basic Education.**



Support for schools, to ensure they are in the **top 20% of state schools nationally by 2030.**



Support for 33 schools by one company. The 21 primary and 12 high schools consistently achieve better matric results than other schools in the area.



Four school infrastructure projects completed.



Equipping three mine community schools with state-of-the-art science laboratory apparatus.

Completion of an early childhood development centre.

Developing skills within local communities is a deliberate strategy to enhance talent pipelines.

One company supported **240 learnerships** to enhance youth job absorption outside of the mining industry, and it supported **215 mining learnerships.**



Learning programmes to provide skills training and preparation for the workplace for people in local communities. Bursaries were offered to 55 students from local communities.



A cadetship programme that offered opportunities of four to six months to

298 unemployed youths

to help them acquire skills necessary to work in the mining sector in entry-level positions. 109 of these cadetships were awarded to females.

In health, the PGM companies:

Contributed to community health through specific services, including providing emergency medical services to respond to incidents outside mining premises, such as vehicle accidents on public roads, medical emergencies in the community and assisting victims of crime. Facilities also focus on TB contact tracing.



Conducted a community-oriented primary care programme, through which a company has built clinics. It also acquired three mobile clinics during Covid-19, renovated a clinic and handed over another clinic.

Appointed Right to Care, a non-profit organisation, as the main implementing partner of the South Africa community health and wellbeing programmes. Right to Care focuses on improving the quality of primary healthcare available at facilities in communities. This includes more efficient dispensing of medication for chronic diseases. It also supports key and vulnerable population groups to improve health outcomes.



Facilitated the supply of potable water to improve health outcomes.



Completed construction of a clinic at Freedom Park, Rustenburg

Provided potable water to beneficiary communities that had no access to clean water by drilling boreholes within a reasonable walking distance from their homes.

ENTERPRISE DEVELOPMENT
PGM companies spent R273 million on enterprise development projects. Two reported supporting 1,860 small businesses. Three reported the creation of 10,358 jobs through these enterprises.

One company spent R57.8 million in support of 36 enterprises which created 2,599 jobs.

Another company spent R14 million on enterprise development initiatives in South Africa. At one mine, a total of 577 community SMMEs are currently registered. Of these, 107 community businesses benefited from R188 million worth of procurement opportunities in 2022.

One company's enterprise and supplier development initiatives

focus on providing procurement opportunities to companies owned by and based in their host communities. It spent R13.3 million on various Enterprise Supplier Development initiatives aimed at training and developing host community-based companies. Through these initiatives, the number of community-based companies registered on the company's vendor database has grown from 57 to 191 in the five years to 2022.

CONCLUSION

We believe the survey paints an informative picture of the breadth and depth of the transformation efforts that have become the standard way of operating for most mining companies, and for Minerals Council members.



Sibanye-Stillwater community project

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