

#MakingMiningMatter

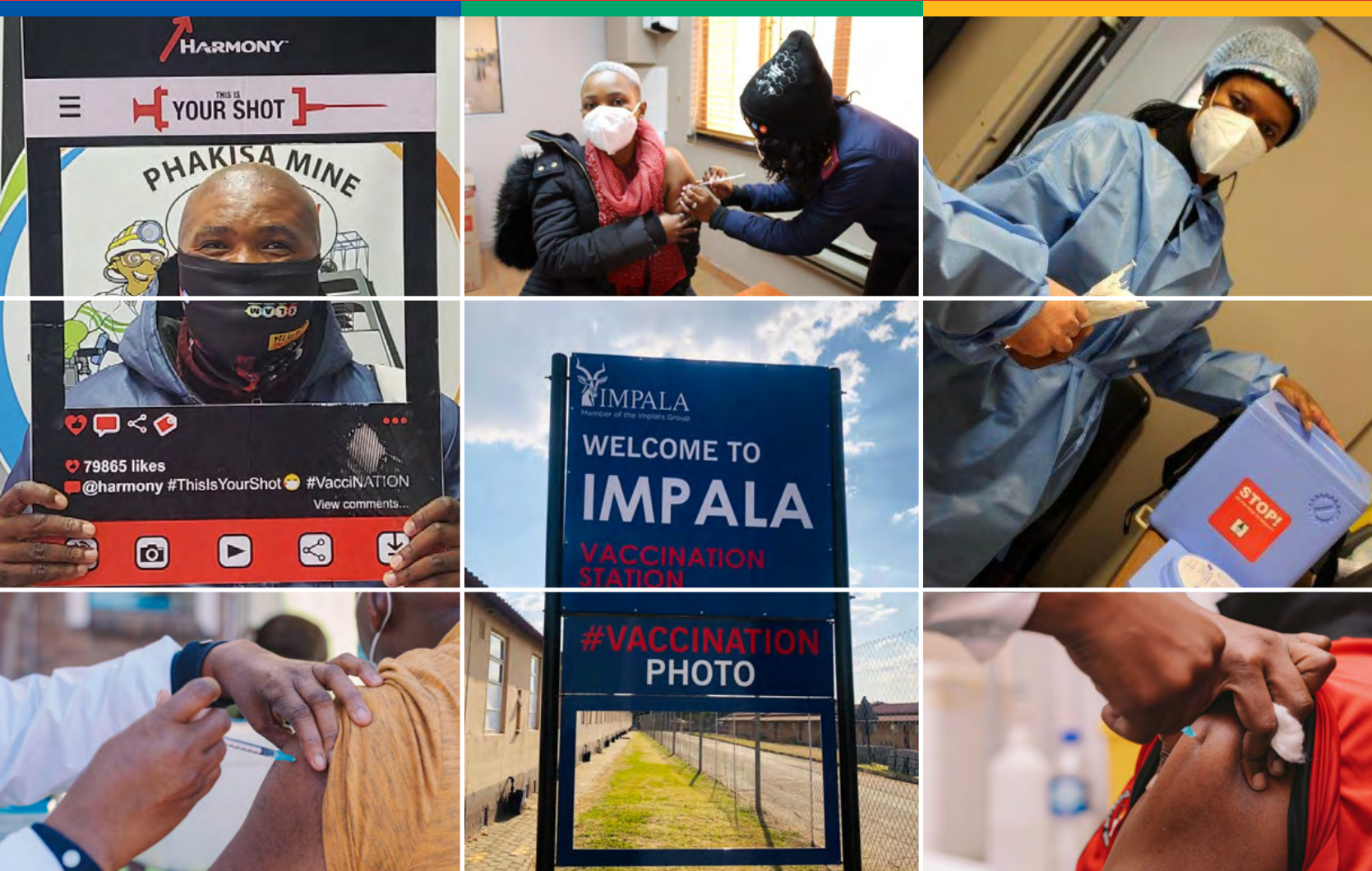
A PUBLICATION PRODUCED BY THE MINERALS COUNCIL SOUTH AFRICA FOR MEMBERS



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FROM THE CEO



Roger Baxter
CEO – Minerals Council

The period since the last newsletter has been extremely eventful and disruptive for our members, particularly the bulk commodity miners.

The events included the outbreak of arson, looting and significant disruptions to the ports of Richards Bay and Durban, and the logistical network of rail and roads between KwaZulu-Natal and Gauteng. Transnet port operations were also severely disrupted by a cyber-attack late in July. There have, however, been signs of constructive efforts from the government to address some of South Africa's and the mining industry's challenges and concerns.

There is no doubt that these disruptive events have had a negative impact on investor sentiment and severely curtailed mineral exports. It remains inexplicable that very few people have appeared in court to face criminal charges related to the unrest and economic devastation in July. It remains to be seen whether President Cyril Ramaphosa's August cabinet reshuffle and his changes to intelligence structures that followed will be sufficient to prevent a repeat of the social unrest. Equally concerning are the socio-economic conditions that made it possible for the instigators of the violence to mobilise so many people.

Those conditions were highlighted by the alarming, but not unexpected, second-quarter unemployment data released by Statistics South Africa in August. It showed a record 44.4% unemployment rate in the expanded definition. This underlined the urgent need for the structural economic reforms which the Minerals Council, and organised business, have been lobbying for in recent years. The pace of reforms is simply too slow.

There is progress, though not as rapid as the country so desperately needs. In the June quarter, President Ramaphosa announced that self-generation power projects of up to 100MW would be allowed without requiring a permit. The regulations underpinning this significant development were gazetted in August by Mineral Resources and Energy Minister Gwede Mantashe. The President also spoke of greater public participation in port activities to boost productivity and efficient cargo handling.

The Minerals Council led by its President, Nolitha Fakude, had a high-level meeting in August with a large team from Transnet led by CEO Portia Derby. The day-long meeting was attended by Pravin Gordhan, Minister of Public Enterprises. There was a full and frank exchange of information regarding



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FROM THE CEO continued

the difficulties experienced by Transnet, particularly in the high levels of theft and vandalism of its rail network and locomotives. The mining industry has forfeited exports worth more than R30 billion due to the constraints at Transnet. The Minerals Council and Transnet agreed on collaboration in a number of critical areas including:



The establishment of smaller working teams focussed on each of the bulk commodities – coal, iron ore, chrome and manganese – to address and resolve specific issues curtailing the exports of these minerals



Higher levels of engagement on annual maintenance shutdowns to ensure improved planning, and to potentially leverage support from the mining sector where Transnet experiences constraints



Working collectively to ensure faster recovery from derailments



Jointly tackling organised and opportunistic crime on the rail network, and seeking support and intervention from government to have it declare these crimes a national priority



The need to collaborate more closely on security issues through the implementation of technologies to reduce theft and vandalism of infrastructure

August is Women's Month in South Africa and we saw our new President, Nolitha Fakude and Vice President Paul Dunne, who are champions of our Women in Mining initiative, taking the lead and showing their commitment to ensuring that our industry makes a difference, and becomes a place where more women are comfortable working.

July saw the launch of our annual National Day of Health and Safety in Mining 2021. We recognised and acknowledged the regression in our safety performance in 2020, and again this year, as measured by the fatal injury frequency rate, and the number of fatalities. The Minerals Council is working closely with the Department of Mineral Resources and Energy and other stakeholders in this regard.

What was encouraging, and gives us even greater determination to reverse the current trend, was the commitment to joint efforts to make mines safer by the Chief Inspector of Mines, David Msiza, and the leaders of the four representative unions – AMCU, NUM, Solidarity and UASA – with whom the Minerals Council leadership shared the platform.

We are proud of our continued efforts to tackle the COVID-19 pandemic. We were able to announce in mid-August that the first 100,000 employees had received at least their first vaccinations, positioning the industry to reach its target of 80% vaccinations by the end of the year. The number of mine sites delivering vaccinations has increased to 52 and, as at 30 September, the number of

“Positioning the industry to reach its target of 80% vaccinations by the end of the year.”

vaccinations had broken through to 213,214 employees and contractors, or 47% of the workforce (54% fully vaccinated and 46% partially vaccinated). This compares with some 31% of the country's adult population having been vaccinated.

However, the mining industry, like the rest of the country, must apply our minds to the slowing numbers of people being vaccinated despite a plentiful supply of the medication in the country. While there are companies which are opting for mandatory vaccinations, the mining industry is not yet at that point.

I hope that, by the time I write my letter for the next edition of this publication, it will be possible to report real and further progress in this regard.

Roger Baxter
CEO



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WOMEN IN MINING INITIATIVE PROGRESS

WiM dashboard launched

The Women in Mining (WiM) initiative has gone from strength to strength since the release of the White Paper in March last year, followed by the first National Day of Women in Mining on 21 August 2020. The COVID-19 pandemic has acted as a powerful incentive to work towards realising our goals.

This year, much of the work of the Women in Mining Leadership Forum (WiMLF) and Task Team has been focussed on ensuring progress towards the initiative's seven Foundational Measures.

Foundational Measure 1 – Reaffirm zero tolerance for gender-based violence (GBV) through the Stop Abuse Campaign

Foundational Measure 2 – Develop gender diversity and inclusion policies



Our overall goal:
to enhance the representation and development of women in the South African mining industry

Much of our initial work last year focussed on the development of a strategy intended to drive the move to gender equity in the industry.

Why did we need a strategy?

- A strategy will help us move from tick-box compliance with numbers, to the real inclusion that will drive value for the industry
- There is clear evidence that the more diverse a company (or an industry), the better it does across a range of metrics
- Gender diversity is a critical target for the industry, and we need to ensure we meet it

There are ethical and moral obligations on us to ensure diversity and equality

Foundational Measure 3 – Provide a reporting system for gender diversity issues

In partnership with Accenture, we have established an online Gender Diversity and Inclusion dashboard where all Minerals Council member companies are required to log a set of specific data linked to the key performance indicators (KPIs).

Why a dashboard? Because, you cannot improve what you cannot measure.

The dashboard is to help ensure that the targets set at the launch of the initiative are achieved – to ensure that the percentages of women in mining at least double by 2025.

Data to be collected focusses on:

- Gender diversity in the workforce
- GBV prevalence and reporting
- Gender equity in learning and development opportunities

- The existence of gender diversity and inclusion policies and related training
- Gender differences in reward and recognition
- Safety – suitable personal protective equipment (PPE) and safe underground toilet facilities

The dashboard went live on 25 August 2021, and we are asking all member companies to log their Q1 and Q2 numbers for 2021. The deadline for companies to register on the system was 15 September 2021 – and that the first two quarters' data must be entered no later than 30 September 2021.

You can access the dashboard here <https://www.mineralscouncil.org.za/work/reporting-portals>



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WOMEN IN MINING INITIATIVE PROGRESS continued



Women in Mining

Foundational Measure 4 –
Initiate unconscious bias training
to transform culture

Foundational Measure 5 – Deploy ongoing
companywide pulse check survey

Foundational Measure 6 – Build an inclusive
physical environment

Foundational Measure 7 – Provide PPE
specifically for women

National Day of Women in Mining 2021

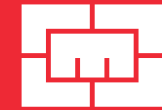
In 2021 we also marked the second National Day of Women in Mining on 19 August.

Nominations for the Minerals Council Women in Mining Modernisation Heroes are open!

The Minerals Council's Women in Mining programme is prioritising the profiling of the work done by women across our sector, in both "traditional" and "non-traditional" roles.

The Women in Mining Leadership Forum invites all Minerals Council member

companies to nominate women in their organisations who have made a notable contribution to modernisation in the industry through their work. These individuals should also have supported their peers, shared knowledge and expertise, and displayed leadership.



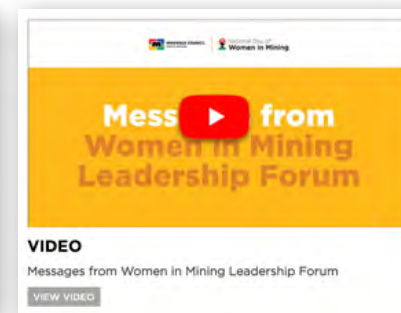
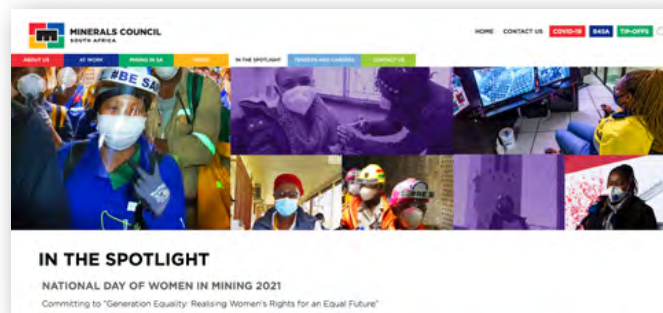
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Considerable effort is also being put into developing wider stakeholder relationships with institutions including the Department of Mineral Resources and Energy, the Mine Health and Safety Council, the Mines Professional Associations' Secretariat, Women in Mining South Africa, and the Southern African Institute of Mining and Metallurgy. The first Women in Mining Stakeholder Forum was held in April 2021, with a focus on establishing working relationships, agreeing areas of commonality, and developing collaboration possibilities – as well as ensuring that duplication of effort is minimised. A second forum is planned for later in the year.

Useful link:

<https://www.mineralscouncil.org.za/special-features/1245-national-day-of-women-in-mining-2021>



END SEPTEMBER SEES CLOSE TO HALF OF MINEWORKERS VACCINATED

The mining industry has reached a major milestone in the fight against COVID-19, with more than 210,000 employees and contractors – almost 50% of the workforce – having been vaccinated.

Says Roger Baxter, CEO of the Minerals Council: “The vaccine offers hope that we can return to a better place. But we can only get there if our society achieves community immunity. Achieving the 200,000 milestone is a huge step in the right direction to achieving our ambitious target of an 80% vaccination rate and will contribute significantly to saving lives and livelihoods.”

Some companies have already reported between 70% and 80% vaccination levels at some sites. At Gold Fields’ South Deep mine, 90% of employees have received at least their first vaccination, while Implats, Sibanye-Stillwater and Harmony have all reported vaccination rates of between 60-70% at some of their operations.

From the outset, the Minerals Council and its members gave their full support to the government-led vaccination programme and worked closely with each other, national and regional departments of health, the Department of Mineral Resources and Energy and the Chief Inspector of Mines, business entities such as B4SA and labour unions in bringing vaccinations to employees.

Dr Thuthula Balfour, Head: Health says: “We started preparing for a vaccine roll-out in February this year, making use of the extensive in-house infrastructure and resources available to the industry. To date, 52 workplace sites have been registered under the Department of Health’s workplace vaccination programme, with many more outreach and temporary facilities operating. Companies that have fewer than 4,000 employees have teamed up with private companies and provincial departments of health to offer on-mine vaccination, while others have been served by a number of larger companies that have availed their facilities.”

Mining companies have also started vaccinating employees’ dependants and community members, either at company sites or at supporting neighbouring facilities.

“The high level of leadership and collaboration displayed by mining stakeholders has been pivotal in the fight against COVID-19. Union leadership, in particular, has played a highly constructive role, with many union leaders visiting vaccination sites, getting vaccinated and sharing their personal experiences,” says Mr Baxter.

“This truly has been a massive mining industry effort,” he concludes.

The Minerals Council and its members will continue with extensive education and communication campaigns both amongst employees and community members.

“Vaccinating as many employees and community members as possible will reduce transmission and prevent serious illness and death. It is up to us to be the difference we want to see in the world. We need to continue to be vigilant in practicing all the non-medical interventions that we have developed since the start of the pandemic. We must always remember that our choices have the potential to affect the lives of others,” concludes Dr Balfour.

Consulting with Dr Balfour

We spoke to Dr Balfour to learn more about the industry’s position on vaccines, why everyone has a role to play – at work, at home and in their communities – and to find out if taking the vaccine is really safe.

Watch this video to find out more.



Useful links:

<https://www.mineralscouncil.org.za/industry-news/media-releases/2021/send/76-2021/1744-vaccination-milestone-200000>

<https://www.mineralscouncil.org.za/industry-news/publications/presentations/send/7-2015/1745-mining-industry-reaches-vaccination-milestone>



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MINERALS EDUCATION TRUST FUND POWERS AHEAD

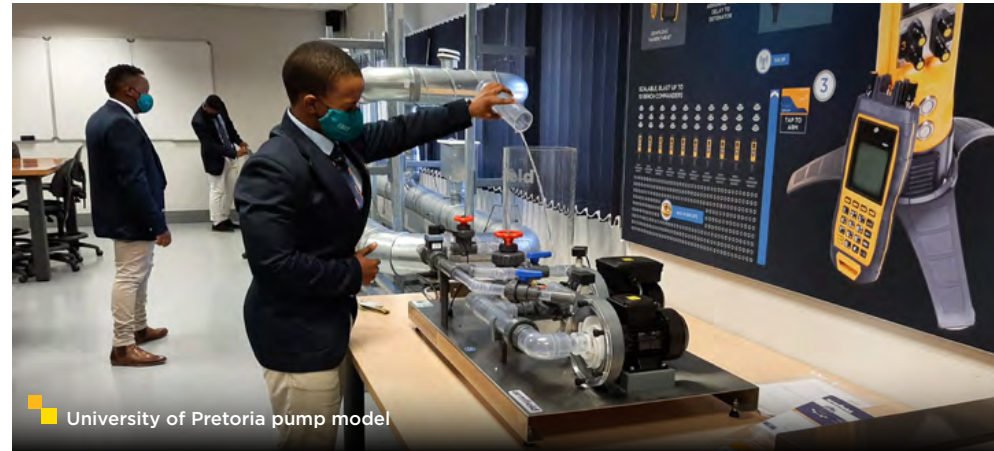
The Minerals Education Trust Fund (METF), established in 2000 by South African mining companies and the Minerals Council as its founding member, has been serving the minerals and education sectors for over 20 years.

The METF receives contributions from its 30 members, representing some of the largest companies in the South African mining sector, with the aim of supporting the development of high-level technical skills by augmenting the salaries of key lecturing staff in disciplines such as mining and metallurgical engineering, and geological sciences.

The METF funds subventions for 252 academic staff members at nine higher education institutions, ensuring the attraction and retention of highly qualified academic staff in subjects such as mine ventilation, rock mechanics, mining geology, extractive metallurgy and various other mining-related undergraduate courses.

In addition, the METF has funded the purchase of capital items such as the latest mine design software used in teaching undergraduate mining engineering courses.

The ultimate beneficiaries of the METF are 4,571 undergraduate students, 76% of whom are historically disadvantaged South Africans, 39% of them women. The role of the METF is key to ensuring a constant supply of the high-level of technical skills necessary for the transformation and viability of the South African minerals sector.



University of Pretoria pump model



University of Pretoria ventilation model



University of Pretoria laboratory

The METF has recently embarked on a process of review and engagement with its contributors and beneficiaries to ensure its ongoing relevance to the industry's skills requirements.

The METF will furnish the Minerals Council member companies with the results of this assessment process as soon as it has been completed.

The METF is extremely grateful for the contributions and participation received from its members on whom its sustainability is dependent. The METF appeals to Minerals Council member companies that are not yet members of the fund to join their peers in making a difference.



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TECH-DRIVEN TRAINING METHODS WILL REVOLUTIONISE SKILLS TRAINING AND SAFETY IN MINING

Modern new training methods currently being developed in the industry promise to bring major changes in the near future.

Technologies like augmented reality and virtual reality will simulate immersive training and extend expertise, advice and support to staff in the field. This can speed up capacity development and improve health and safety outcomes in high-risk industries like mining.

As part of the Reimagining Training in Mining initiative under Modernisation's Mining Skills 4.0 programme, we compiled a technology scouting report on innovative education technology (EdTech) solutions with high potential for a positive impact.

The report is a response to the CEO Zero Harm Forum's mandate to focus on training and how it can embed the safety and health practices required to achieve the industry's goal of zero harm.

Among the top EdTech trends, immersive and device-based learning technologies show potential to significantly improve zero harm production outcomes. Immersive learning is a technique that makes use of an artificial or empowering environment, leadership that guides the way simulated environment through which the learners can become completely immersed in the learning process. It allows learners to control the outcomes by connecting them with real experiences, but in a safer environment.



Device-based learning uses digital devices ranging from computers or laptops, for desk based in-depth learning, to mobile devices, such as smartphones and tablets, for on-the-go micro-learning.

Virtual reality, augmented reality, mixed reality, eLearning and M-learning are among the five technologies identified in the report as offering the benefits of on-the-job training, improved retention and application, and improved awareness, which leads to behavioural change.

However, for these technologies to have the right impact, they must be underpinned by sturdy evidence-based methodologies that take different ways of learning into account by utilising cognitive and behavioural sciences to enhance effective learning and understanding. An enabling culture must also be in place for successful implementation.

The Minerals Council and its strategic partner, RIIS, have partnered with Harmony to host



a Reimagining Training in Mining innovation showcase, which is investigating the use of EdTech in training, upskilling and reskilling the workforce as a way to address the gap between traditional learning and the need for more dynamic, tech-assisted skills training.

A call for proposals was launched on 18 June 2021. Entrepreneurs and others were invited to make submissions that had the potential to be applied in the mining training value chain.

Twenty-seven submissions were received, ranging from virtual, augmented and mixed reality solutions through to learning management systems and physical products, containing components of gamification and focusing on health and safety.

Of these, six were shortlisted and went through a co-development stage to enable the application of their solution in mining. These innovations were showcased at a hybrid event on 30 September and 1 October 2021. Judges are expected to



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TECH-DRIVEN TRAINING METHODS WILL REVOLUTIONISE SKILLS TRAINING AND SAFETY IN MINING continued

identify a solution that will be piloted and evaluated at Harmony.

The end goal of the showcase is to enable collaboration between mining companies and EdTech suppliers to boost cross-industry co-operation, empower entrepreneurs so that they have an opportunity to gain access to the market and demonstrate their

solutions directly to potential clients, pilot new technology in the mining industry, and optimise the cost-effectiveness of training while bringing the industry closer to its aim of zero harm.

The showcase is the practical demonstration of our journey to a people-centred, technologically-enabled, modernised mining

industry in South Africa – one that brings its people along with it and that helps us reimagine mining.

“Bringing the industry closer to its aim of zero harm.”



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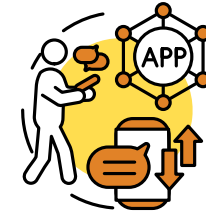
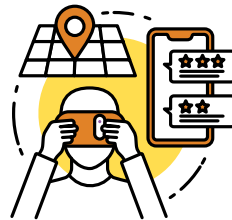
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Immersive learning through extended reality

Device-based learning



Virtual reality

Completely digital environment that is fully enclosed to provide a 'virtual' experience

**Virtual environment +
Virtual objects**

Mixed reality

Real and digital environment with interaction and manipulation of both physical and virtual environment

Completely digital environment that is fully enclosed to provide a 'virtual' experience

**Real environment +
Virtual environment +
Virtual objects**

Augmented reality

Real world reality has digital information overlain and is enhanced by virtual details / objects

**Real environment +
Virtual objects**

eLearning

Training conducted using a fixed computing device

Aim is to enable understanding and retention of either specific skills or in-depth knowledge on a subject

M-learning

Training conducted using a portable computing device

Aim is for quick knowledge distribution and instant accessibility to information

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MEDIA RELEASES

To find out more about the Minerals Council's recent activities, take a look at the media releases listed below:

30 June	Minerals Council strongly condemns lawlessness in Richards Bay area
8 July	National Day of Health & Safety 2021: Renewed Focus for our New Normal
14 July	Minerals Council strongly condemns violence and looting and deeply concerned about the loss of life
26 July	Minerals Council and labour unions support COVID-19 vaccination to save lives and livelihoods
6 August	Minerals Council notes timely cabinet reshuffle
18 August	Industry reaches vaccination milestone of +100,000 employee vaccinations
19 August	National Day of Women in Mining 2021
24 August	Transnet and Minerals Council meet to strengthen cooperation
25 August	Minerals Council urges accelerated implementation of institutional and structural reforms
22 September	Minerals Council welcomes regulatory certainty in High Court judgment on the 2018 Mining Charter
23 September	Mining industry vaccination programme reaches milestone – 200,000 employees and contractors fully or partially vaccinated



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